



SPORT

WOMEN IN SPORT REPORT 2021

The growth in women's sport -
and what it means for marketers

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INTRODUCTION

This paper explores how women's sport is perceived around the globe – with the aim of giving marketers an inside track on identifying where the greatest value lies.

It is based around two central truths. First, that women's sport is currently less popular than men's and, second, that there is no reason it must continue to be so. If you accept these premises, women's sport offers marketers a great deal of potential – for, despite recent strides, there remains considerable room for growth.

And while growing women's sport offers commercial opportunities, there is, of course, more at stake – equality in general. With that in mind, the data in this paper should allow sports administrators plenty of insight for re-imagining how parity between men's and women's sport can be attained – or at least how to close the gap.

The core of our paper draws on research from 13 markets around the world, based on inputs

from our panel of over 15 million consumers worldwide – ranging from Italy to India. It takes in the views of the public from major sporting markets including the US, the UK, Germany, Japan, Australia and France. All multi-market data is weighted by market population size.

In each market we answer several key questions, namely:

- How popular is women's sport?
- What attracts its followers; and what keeps people away?
- Whether, how, and by how much people perceive that women's sport is treated inequitably?
- Which women's sports, leagues and stars get most cut-through?
- Whether people think that women's sport is on the up?

As well as providing global data, we also dive more deeply into the situations in the US and the UK.

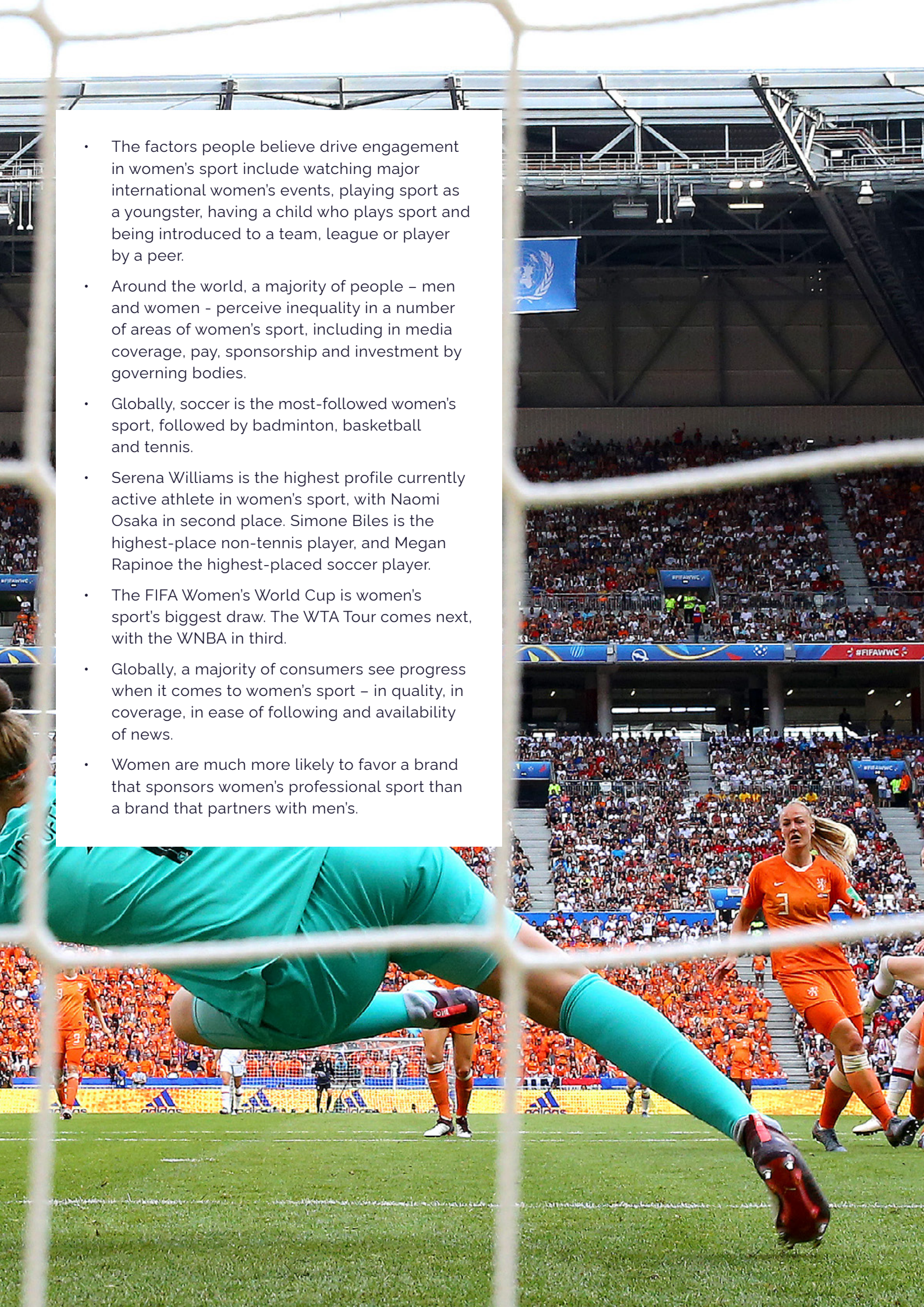
Markets	
Australia	Japan
Canada	Mexico
China	Spain
France	United Arab Emirates
Germany	United Kingdom
India	United States
Italy	

EXECUTIVE SUMMARY

- Overall, the global public is almost twice as likely to watch men's sports as women's and men are more likely to watch women's professional sport than women.
- Men's sport was more popular than women's in all 13 of the core markets we polled.
- 'Supply-side' issues are the main factors in deterring consumers from engaging in women's sport – including low levels of media coverage, a lack of marketing and a lack of information or knowledge around women's sport. In fact, people tell us they would watch more women's sport if there were more of it on TV. 12% of this cohort are those who currently do not consume women's sport, a figure that's highest in the USA (26%) and UK (24%).
- The speed, quality and physicality of women's sport is much less likely to be cited as a factor for not engaging.



- The factors people believe drive engagement in women's sport include watching major international women's events, playing sport as a youngster, having a child who plays sport and being introduced to a team, league or player by a peer.
- Around the world, a majority of people – men and women – perceive inequality in a number of areas of women's sport, including in media coverage, pay, sponsorship and investment by governing bodies.
- Globally, soccer is the most-followed women's sport, followed by badminton, basketball and tennis.
- Serena Williams is the highest profile currently active athlete in women's sport, with Naomi Osaka in second place. Simone Biles is the highest-place non-tennis player, and Megan Rapinoe the highest-placed soccer player.
- The FIFA Women's World Cup is women's sport's biggest draw. The WTA Tour comes next, with the WNBA in third.
- Globally, a majority of consumers see progress when it comes to women's sport – in quality, in coverage, in ease of following and availability of news.
- Women are much more likely to favor a brand that sponsors women's professional sport than a brand that partners with men's.



A high-angle photograph of two female badminton players on a green court. The player on the left is in a low, ready stance, leaning forward with her racket on the ground. The player on the right is also in a ready stance, holding her racket with a yellow grip. Both are wearing white athletic uniforms with various sponsor logos like Rinnai, JTB, and ANA. The court has white boundary lines. The image is split diagonally by a light green and beige geometric shape that serves as a background for the title.

THE POPULARITY OF WOMEN'S AND MEN'S SPORTS AROUND THE GLOBE

Globally, the public is almost twice as likely to watch or follow men's sport as it is women's. Although the difference is less pronounced for certain types of sport, like collegiate/university and amateur sport, in no category is the women's version more popular than the men's (see Figure 1). This provides tremendous upside potential for women's sports to grow in the future.

Global - % of respondents who claimed they watch these sports

% of respondents

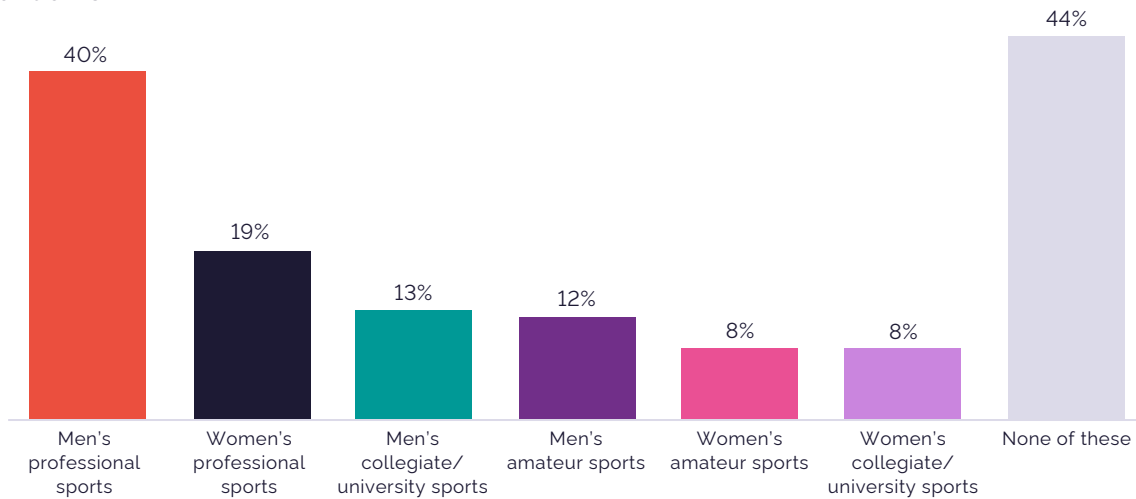


Figure 1

Which, if any, of the following sports do you watch or follow?

The difference is most pronounced in the richest and most influential category – professional sport. While two in five (40%) of the public watch or follow men's pro sport, fewer than half that proportion (19%) tell us they follow the women's equivalent. In the other categories, the gap between consumption of men's and women's sport is much less pronounced – data in later sections will shed some light on why this might be.

Whilst men are more likely to watch or follow almost all types of sports – women are also partly responsible for this difference too – at least in professional sport. Women are around a third more likely to watch men's pro sport than they are women's (26% vs. 18% - see Figure 2).

Global - Followership for types of sport – by gender

% of respondents

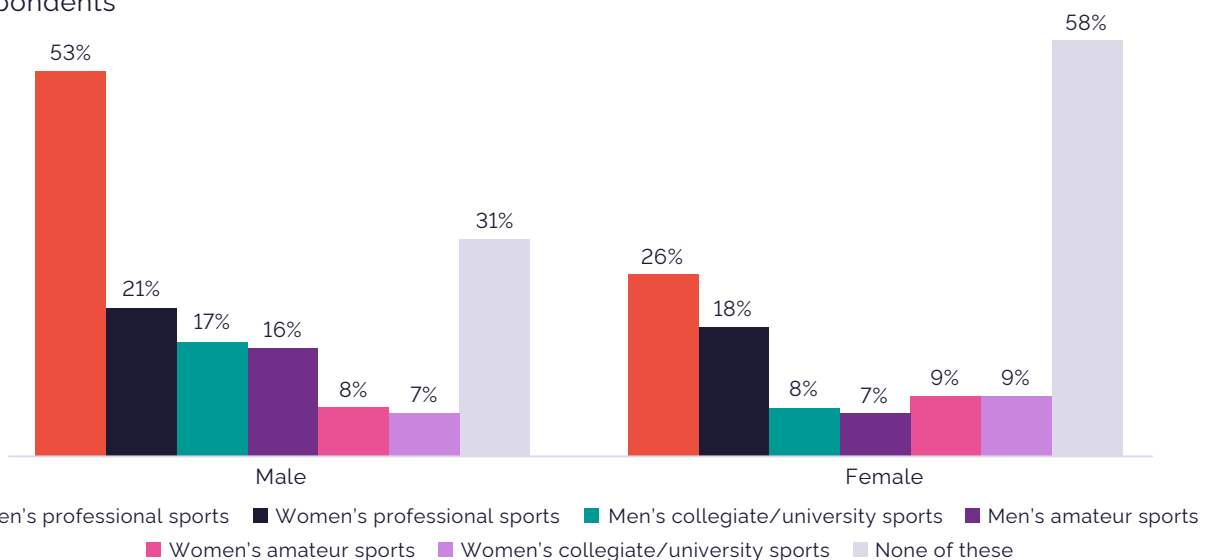


Figure 2

Which, if any, of the following sports do you watch or follow?



Expert view – When it comes to amateur sport, women are more likely to follow women's than men's. It's quite possible that this is because amateur sports tend to be more equitably marketed and supported, compared to their professional equivalents.



But are there countries which are exceptions to this rule – markets where women's sport vies more or less equally with men's?

The answer here is no – at least taken as a whole market, as opposed to looking at individual

sporting disciplines. In each of the 13 core countries we polled, men's professional sport was significantly more likely to attract a following than women's – often by more than twice as much and sometimes by more than three times as much (see Figure 3).

Followership for men's and women's sport – by country

% of respondents by country

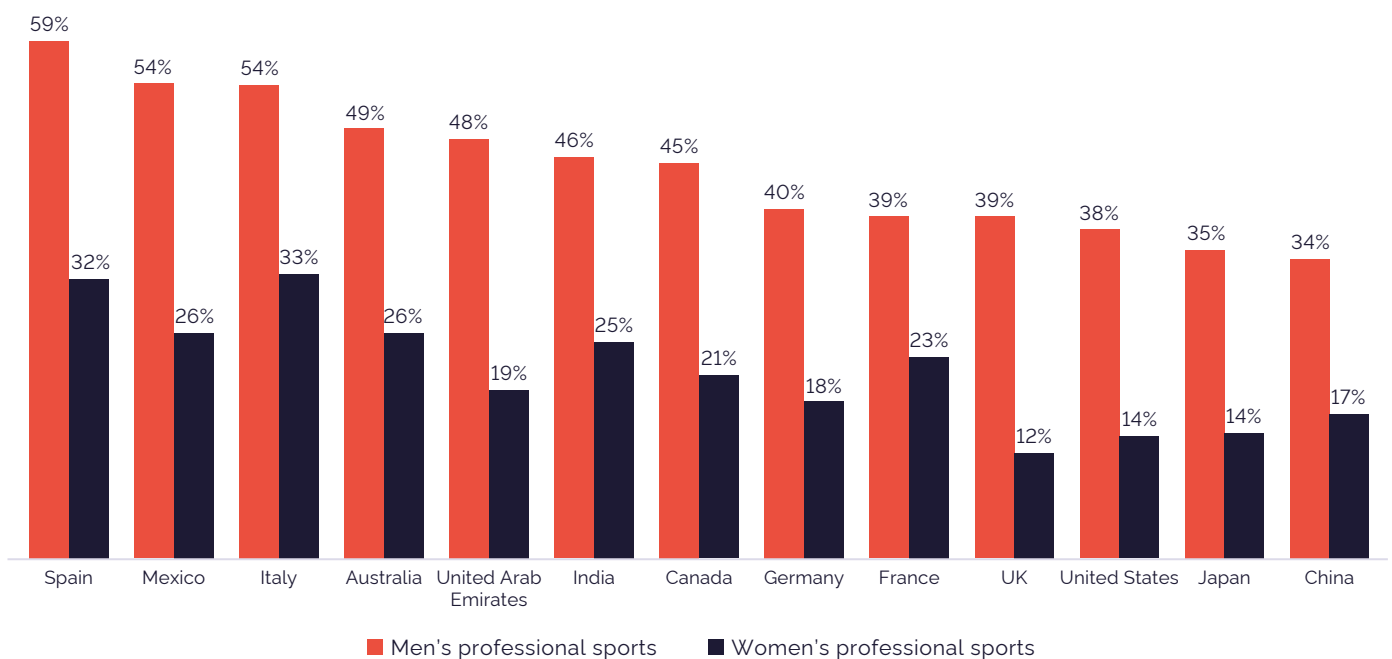


Figure 3

Which, if any, of the following sports do you watch or follow?

The UK has the lowest followership for women's pro sport, where it runs at just one in eight of the general population (12%). At the other end of the scale is Italy, where one third (33%) of the public follow or watch women's professional sport. It is closely followed by near-neighbor Spain, where 32% do the same.

While all countries have a larger proportion of followers of men's sports, the countries where's

women's sport is closest in audience size include France, Spain, India, and Italy.

It's a similar story when it comes to sports consumption. Amongst those who follow sport, only a small minority tell us that they consume more women's sport than men's and in only one country (Mexico) do more than half of consumers say they watch men's and women's sport equally (see Figure 4).

Consumers who watch more women's sport vs. more men's sport vs. equal consumption – by country
 % of respondents by country

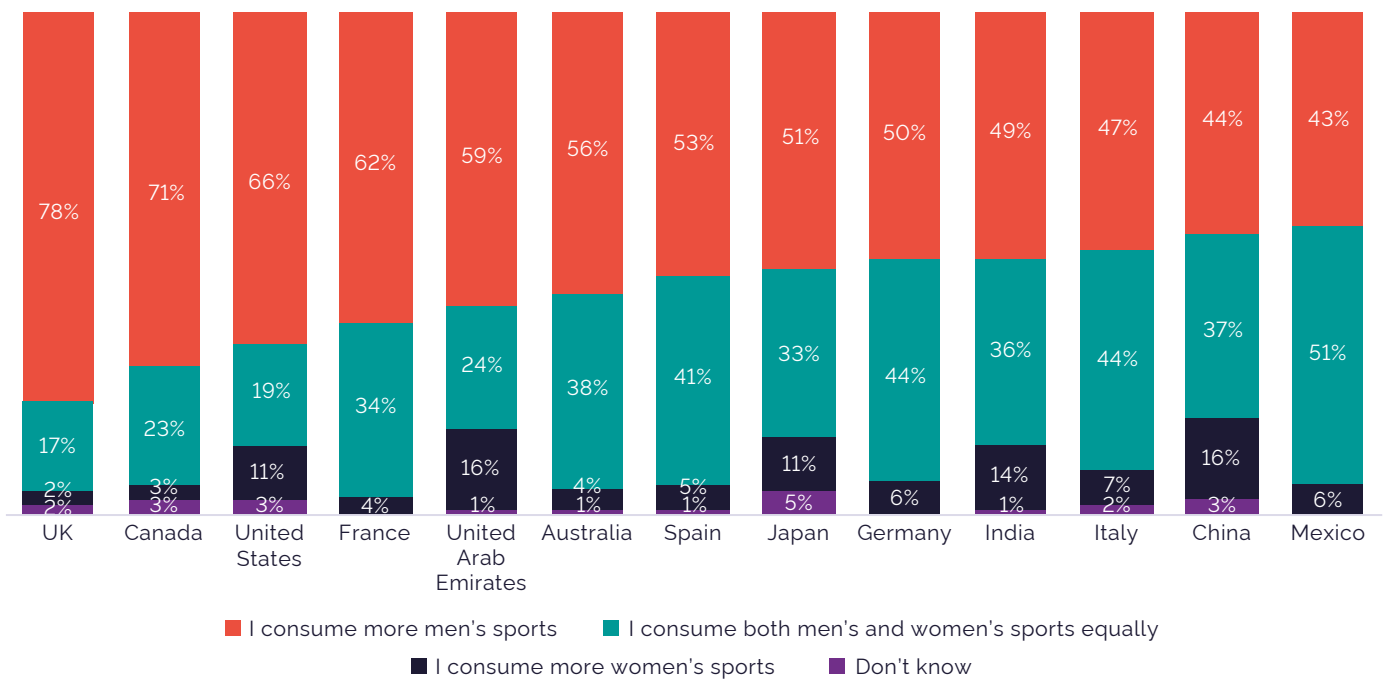


Figure 4
 Do you consume more men's sports or women's sports?

Expert view – There's no question that people follow and consume men's sport more than women's. But the differences in consumption between countries tells us that in many markets there is scope for a more balanced level of consumption – and room for growth in the profile of women's sport. It's important to note though, that sport – including women's sport – may need to do a better job of engaging women as part of this.



US deep dive

Americans do not follow the global average when it comes to following sports. They are less likely to follow both men's professional sport (38% vs. 40% globally) and women's (14% vs. 19% globally). However, they are significantly more likely to follow women's collegiate sport (12% vs. 8% globally). That's to be expected, given that the US has the most commercialized Collegiate Athletics program in the world.

Data from the States also reveals differences in the following behaviors of men and women. Men are more likely to follow sport in each of our categories (see Figure 5) - in the case of men's amateur sport by three times as much. The gender differences start to shrink when looking at women's sports. For example, when it comes to women's professional sport, the category is followed by 16% of males and 12% of females. Across the board, men's sports are still more popular than women's sports with females.

US – Followership of types of sport by gender
% of US respondents

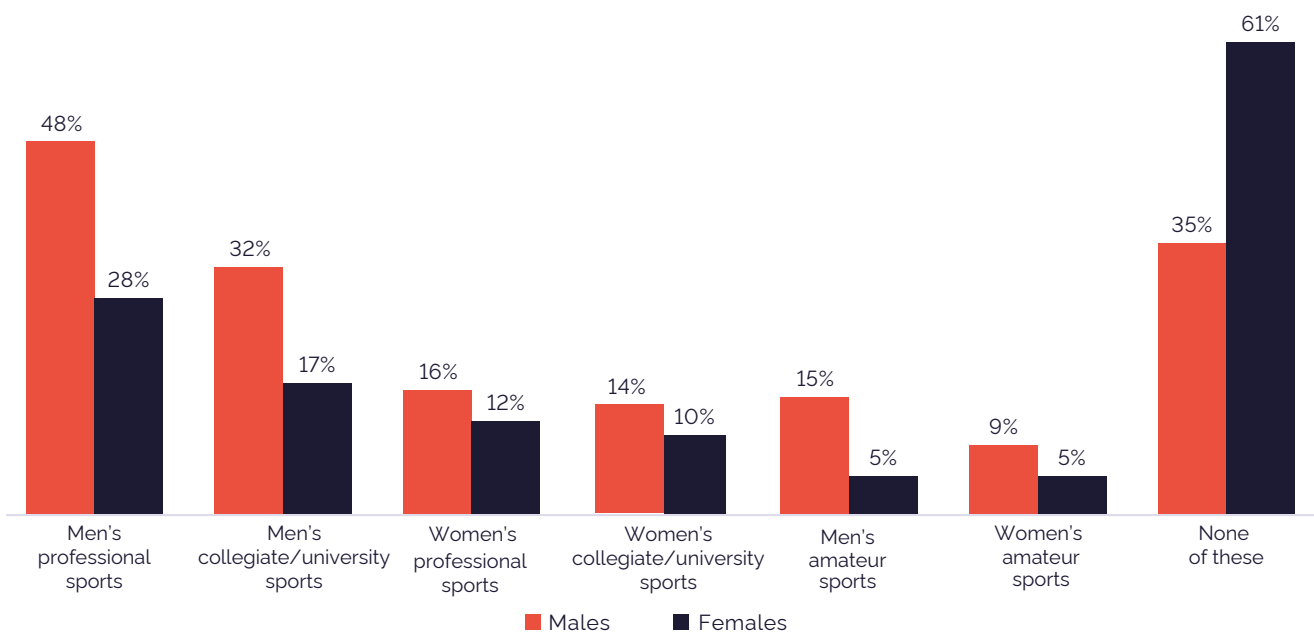


Figure 5
Which, if any, of the following sports do you watch or follow?

UK deep dive

Britons are less likely to follow all types of sport than the global average and this is even more pronounced in women's professional sport, where 12% of Brits watch compared to 19% of the global

population (see Figure 6). A vanishingly small proportion of Britons (1%) watch women's amateur sport, compared to 8% globally.

UK – Types of sport followed vs. Global
% of UK respondents

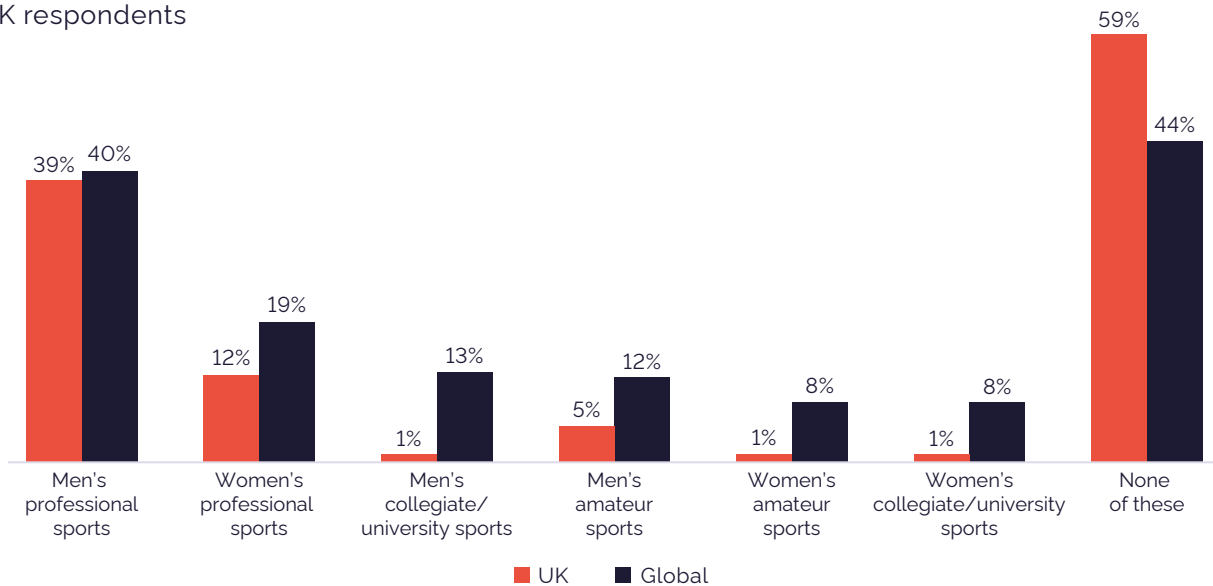


Figure 6
Which, if any, of the following sports do you watch or follow?





MOTIVATIONS FOR - AND CHALLENGES TO - INTEREST IN WOMEN'S SPORTS

If we've well and truly established the numbers by which people currently prefer to follow men's sport versus women's, what does the data tell us about what factors affect that preference – or lack thereof? Vitally, how can marketers use that knowledge to drive value from this understanding?

What's stopping people from following women's sport

For most people around the world, the reasons they don't currently engage in women's sport are related to its lower overall profile, rather than the

game or sport itself or how it's played relative to men's versions.

The most popular reason people give around the world for not following is the lack of media coverage for women's sport (see Figure 7). Indeed, a [European research paper](#) by campaign group, Women in Sport, has found evidence to support this – they assert that in four of the five countries they studied, women's sport coverage failed to achieve above 10% of all sport's coverage in any single monitoring period. [USC/Purdue study](#) found that 95% of the output of American sports news coverage focused on male athletes.

Global - Reasons why people say they don't engage in women's sport

% of respondents

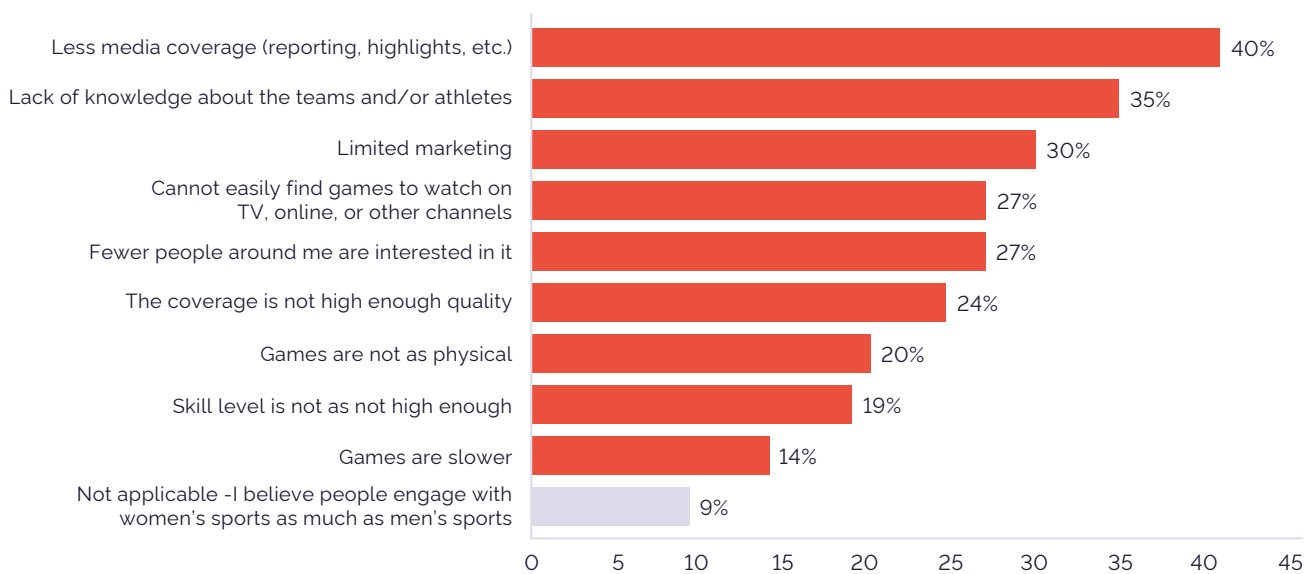


Figure 7

Which, if any, of the following, do you believe are reasons why people don't engage with women's sports as much as men's sports?

Two other 'supply-side' issues also commonly crop up around the world – 30% cite a lack of marketing for women's sport, while 27% say they find it difficult to find games to watch.

Far down the list of barriers is the speed or physicality of the game. These are not major factors for women's sports; rather it is media, coverage, and story. Only one in four (24%) question the quality of

coverage, while questions around the quality of play – related to skill, speed or physicality – only register as an issue for between one in five and one in seven potential viewers. In all these latter-mentioned cases, men are more likely to cite these factors than women. The corollary of this is that most people believe that female officials and female managers/coaches are just as good as their male counterparts (60% and 61%).



Expert view – Supply-side reasons are those most commonly-cited as a reason not to tune in – and that's something rights holders, broadcasters and media can address by working together to make the sports and their stories more consistently visible.

Storytelling and drama must be at the heart of women's sport, just as it is to men's. If they are to keep returning to it, viewers need to be able to keep track of the narratives that keep a sport or league interesting.

Related to this, another limiting factor in building the appeal for women's sport is a lack of knowledge about teams and athletes. In this respect, men's sport is no different to women's. Taken in isolation, games and teams may lack appeal. But woven together, with rivalries, human dramas and the heat of competition, the narrative becomes much more compelling.

What draws people to women's sport?

While there are also some gender differences around the factors perceived to draw fans into women's sport, they are not nearly as pronounced.

Big events are seen as crucial to the growth of the popularity of women's sports. Four out of ten respondents (42%) said a major event like a FIFA World Cup or an Olympic Games provides an opportunity to follow a female athlete, team, sport, or event. It's no surprise that these events – some of the most-watched in the world – act as catalyst for further viewing. They often offer a parity for women's sports that does not exist at other points in the sporting calendar.

In the case of the Olympics, there are as many as 18 mixed-gender events planned for Tokyo,

signifying the appeal that this set-up offers. Meanwhile, the quadrennial FIFA Women's World Cup elevates the profile of women's sport to a place that can barely be ignored in some countries. In the home country of 2019 tournament winners, the USA, 14.3m viewers tuned into the final, three million more than had watched the men's version the previous year (although for context, almost 100m watched that year's Super Bowl).

Many believe childhood plays a significant role in turning people onto women's sport too (see Figure 8). Around a third of people (35%) say playing sport as a child is likely to spur an interest and, for around the same proportion (30%), having a child who played a sport is seen as a reason to engage in sport played by women.

Global – Perceptions of reasons why people become interested in women's sport

% of respondents

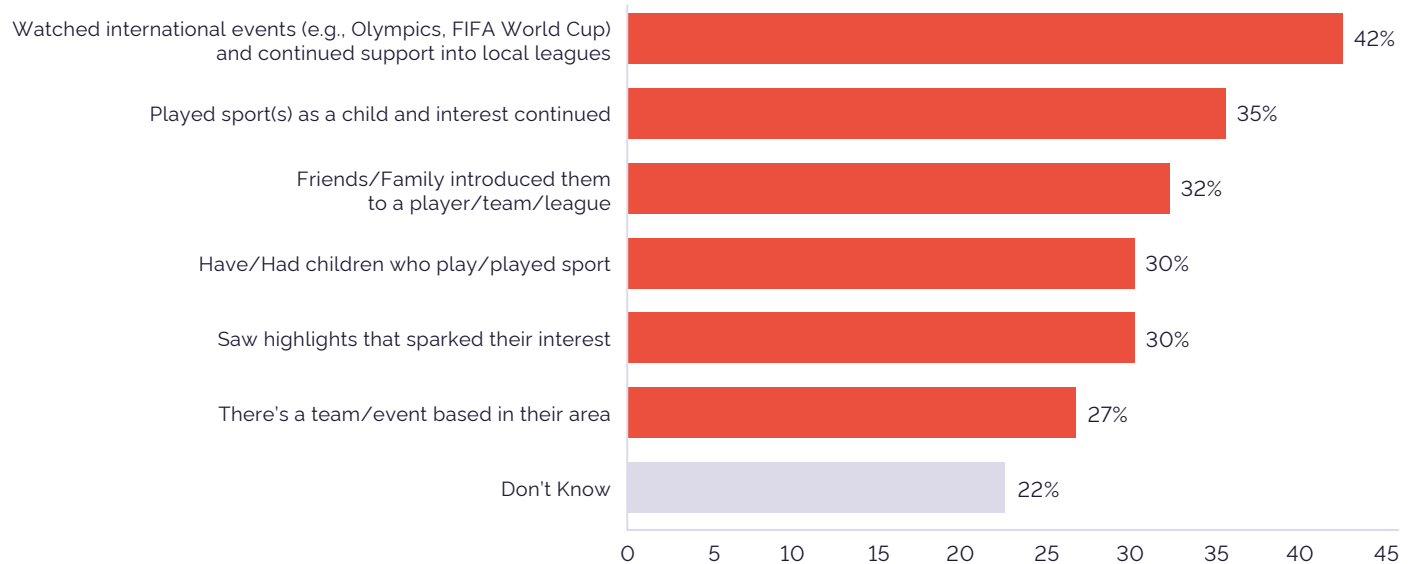


Figure 8



Expert view - Whether playing the short game (aimed at parents) or the longer game (aimed at children), engaging young people is key to driving an interest in women's sport. Marketers need to think about making that journey as seamless as possible, and consider the touchpoints needed to maintain interest.



A third important factor (after big events and sport participation) is the recommendation of friends and family. Every brand knows that recommendation is an important part of driving preference and for many people, women's sport is no different. Data captured by YouGov SportsIndex tells us, for example, that over the last full year, the FIFA Women's World Cup was America's 13th most-recommended sports competition, beating a host of high-profile men's properties.

Likewise, accessibility is perceived to be an important factor – both when it comes to having

access to bite-size coverage which sparks interest and to being geographically close to a team or event.

Looking at this data by country, there is a good deal of variation so marketers should be wary of one-size-fits-all strategy. In China, for example, the most popular factor in engaging people in women's sport is perceived to be watching a major international event (42%) whereas in Germany that drops to 29%. There the most popular factor given is playing sport as a child.

Big, global events and national interest/patriotism drive support and engagement

Based on % of respondents who selected at least one of the options in the chart

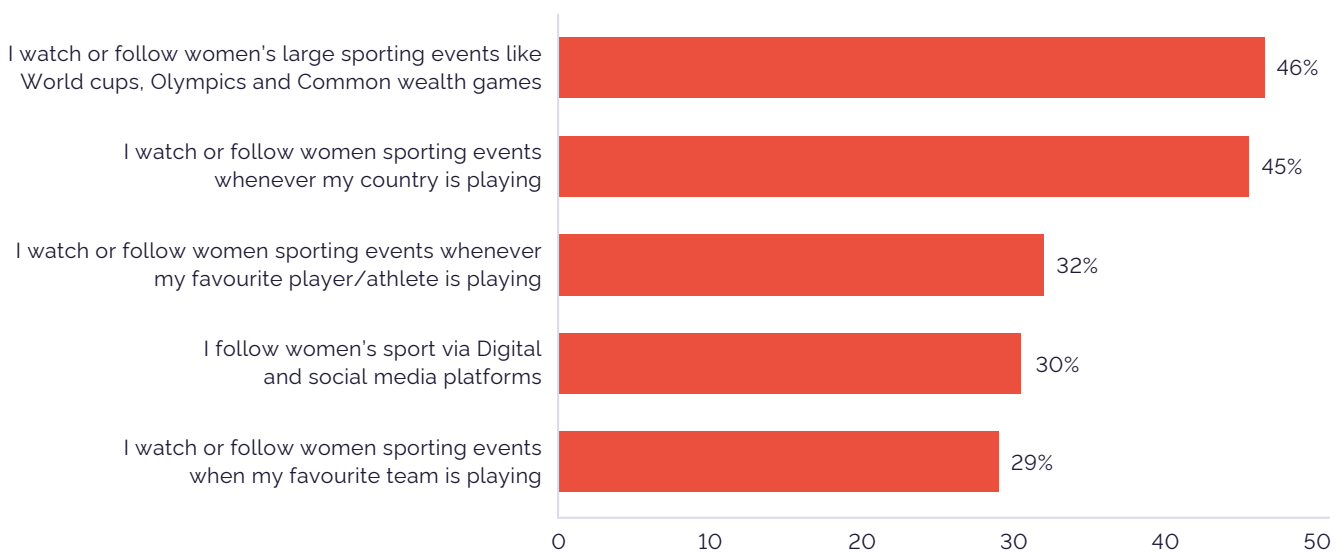


Figure 9

Which of the following options applies to your current support of women's sporting events?



Expert view – We can see that favourite teams and stars are a significant driver of interest. But later in the report, we show how awareness of female athletes is typically low. Investing in the profile of specific athletes and teams may therefore be a good avenue for driving greater fan interest.

We already know that watching a major event is seen by many as a trigger for a longer relationship with women's sport so it's encouraging for organizers that this option is the most popular way to follow female athletes (see Figure 9).

National pride is also a driver of interest, with almost half of those that support (45%) saying that they follow women's sport this way. Favorite teams and athletes then play the next most important role, both cited as a reason to support by around three in ten followers.

But again, marketers need to be aware of nuance here. As we established earlier, men represent

the biggest audience for women's sport and this is represented in a gender breakdown of these figures too. Men are slightly more likely than women to cite each of these factors than women but when it comes to support of their favorite team it is by 21%.

More variation occurs between age groups. Interest among older age groups (55+) is much more likely to be driven by major events and national pride, whereas younger fans (aged 18-24) are more likely to engage with women's sports on social media and follow favorite players/teams.



Expert view – Major events are certainly popular when it comes to ways to follow women's sport. But quadrennials can lack the sustained profile which leagues and annual events offer to marketers. Although these attract smaller audiences, they can work well for brands seeking sustainable value and niche audiences.

Television coverage plays a crucial role in driving viewing and engagement

The amount of women's sport on TV is frequently cited as a barrier to engagement. So where is unmet demand highest – and lowest?

% of people who would watch more women's sport if there was more on TV

By country

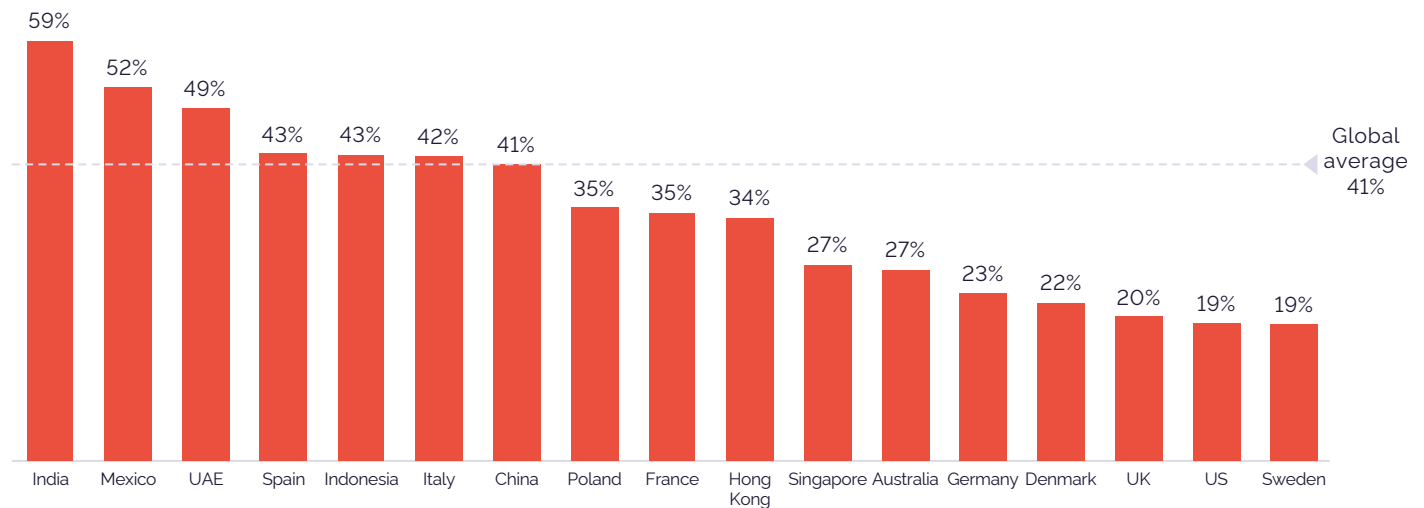


Figure 10

If there was more women's sports on TV, I would watch it? Strongly Agree/Agree

Figure 10 shows that, globally, two-fifths of people (41%) say they would watch more women's sport if there were more of it on the television. There are big variances between countries. The public in European countries are less likely to agree with this

statement but it's not clear whether that's because they feel that there is already enough women's sport on TV or whether they simply don't have the appetite for more.

% of people who would watch more women's sport if there was more on TV

By those who already watch vs. those who don't

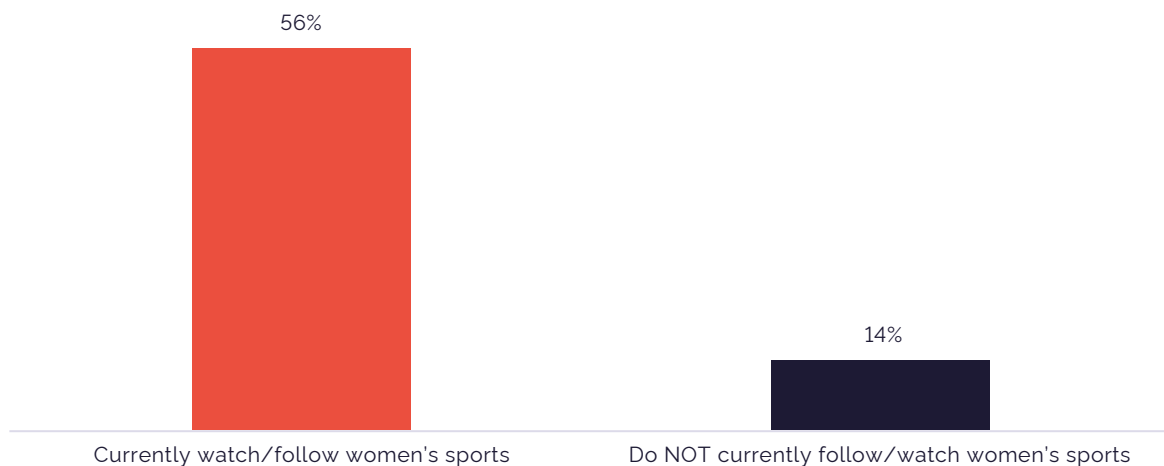


Figure 11

If there was more women's sports on TV, I would watch it? Strongly Agree/Agree



US deep dive

Americans give the same reasons for not engaging in women's sport in almost the same proportions as the global average (see Figure 12). The biggest difference is to be found on production values, where Americans are 33% less likely to say that

the coverage of women's sport is not high enough quality. But other than that, Americans, like the rest of the world, relegate skill differential, lack of physicality and speed of games to the lower end of the scale for reasons not to tune in.

US - Reasons why people say they don't engage in women's sport

% of US respondents

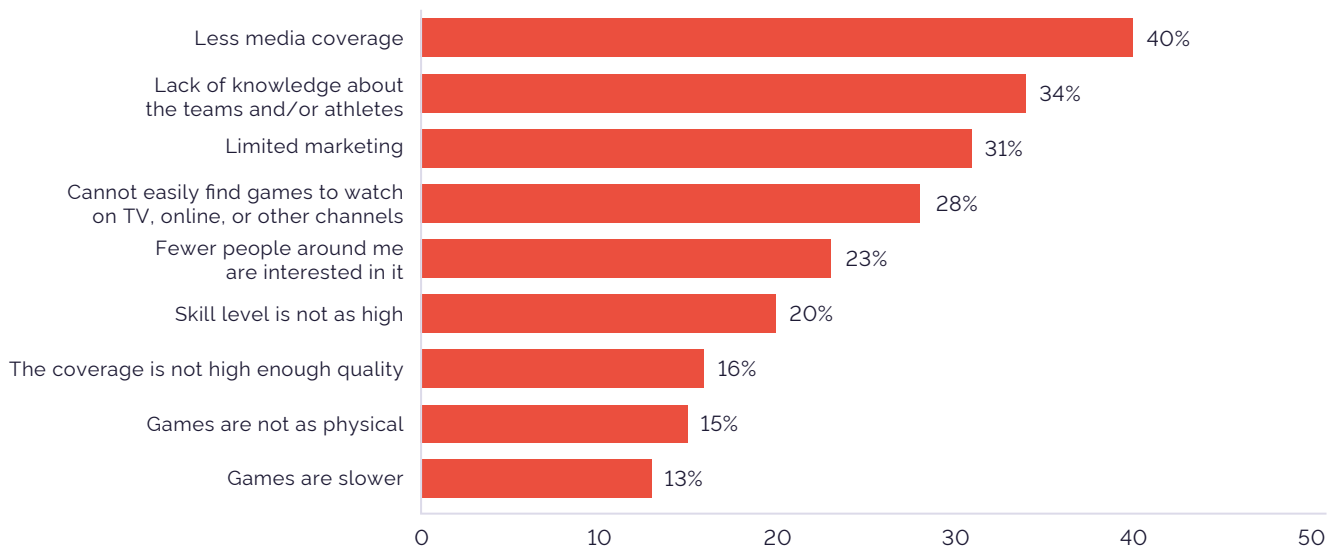


Figure 12

Which, if any, of the following, do you believe are reasons why people don't engage with women's sports as much as men's sports?

In terms of what drives followership, Americans are much more likely to cite the importance of a child's involvement than the global average (43% vs. 30%) and slightly more likely to cite the significance of childhood participation (42% vs 35%). They are also slightly less likely than the global average to say interest is sparked by international events (37% vs.42%).

US - Perceptions of reasons why people become interested in women's sport

% of US respondents

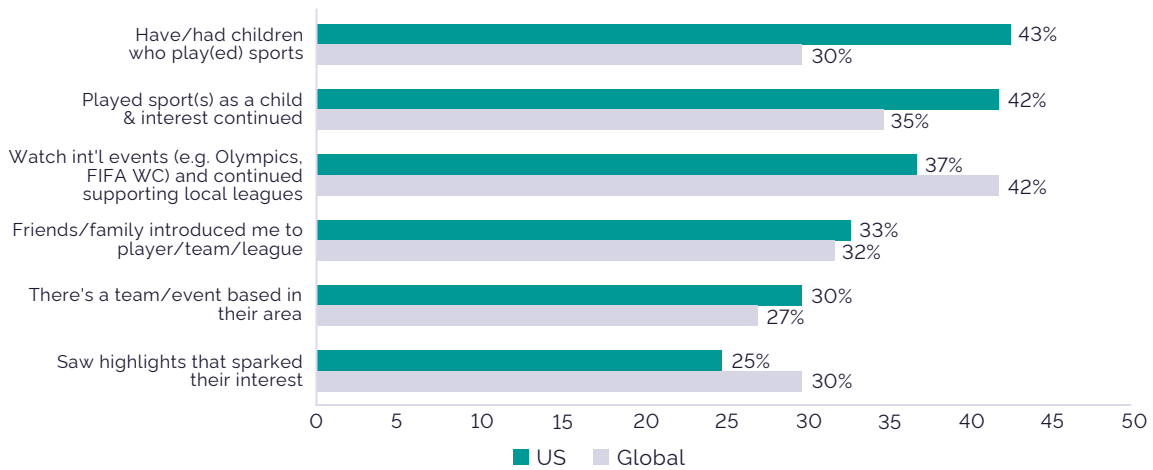


Figure 13

Which, if any, of the following reasons do you think explain why people become interested in women's sports?

UK deep dive

Britons predominantly track the global average when it comes to reasons they don't engage in women's sport (see Figure 14), with a lack of media coverage and knowledge about teams leading the way. However, they are much less likely than the global average to say women's games are not as physical (12% vs. 20%).

UK - Reasons why people say they don't engage in women's sport

% of UK respondents

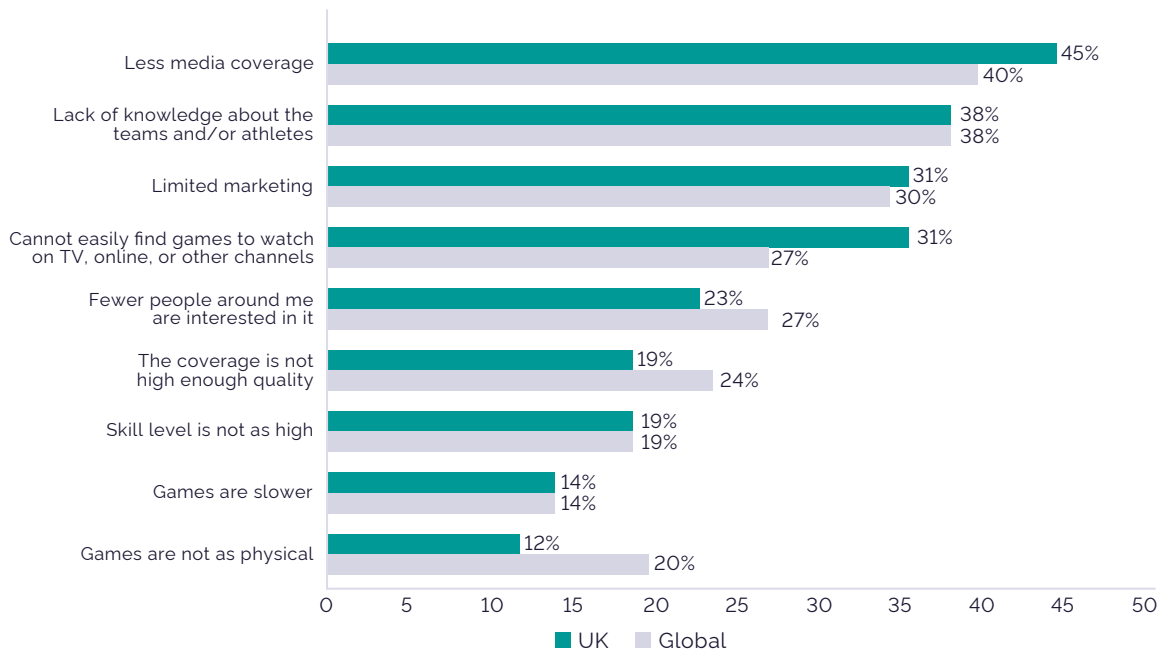


Figure 14

Which, if any, of the following, do you believe are reasons why people don't engage with women's sports as much as men's sports?

Likewise, with a single exception, Britons' perceptions of the reasons for becoming interested in women's sport follow the global average.



The primary factor people perceive is watching international events but they are significantly more likely to say an experience of their children playing is likely to be an influence (38% vs. 30% global average – see Figure 15).

UK - Perceptions of reasons why people become interested in women's sport

% of UK respondents

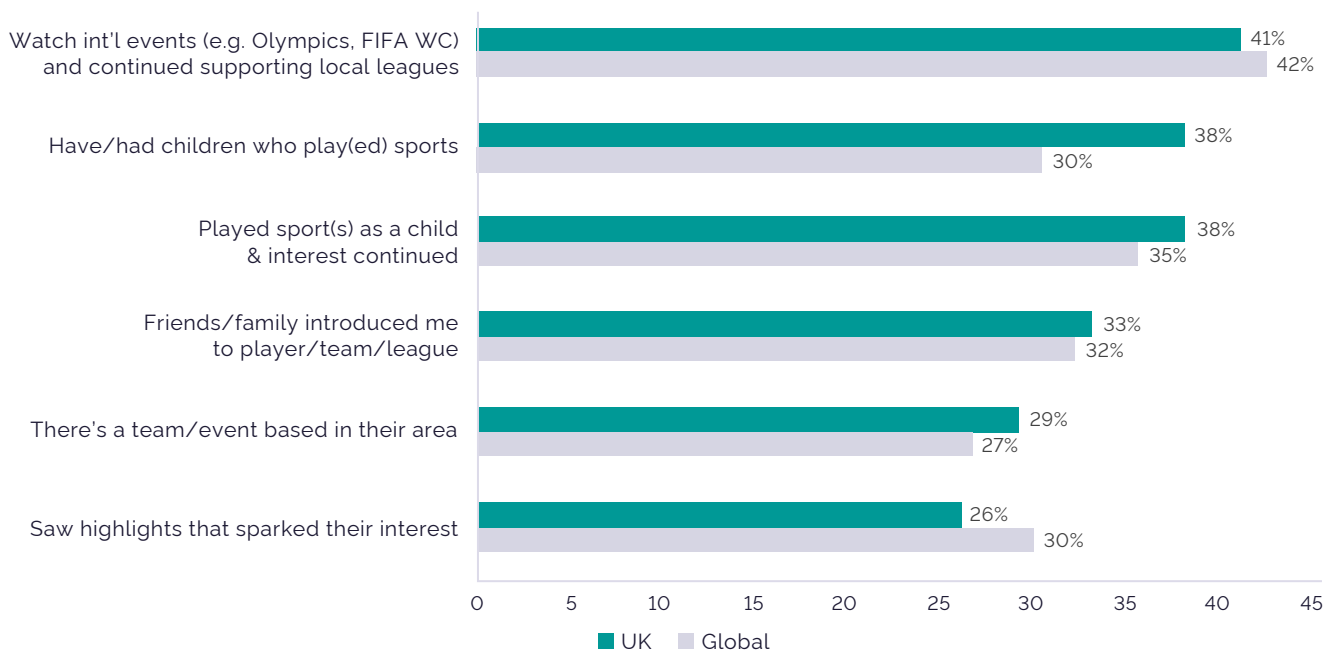


Figure 15

Which, if any, of the following reasons do you think explain why people become interested in women's sports?



INEQUALITY AND WOMEN'S SPORT - AND ITS RELATIONSHIP TO PROPERTY VALUE

We've seen how global audiences watch, follow, and engage with women's sport differently, but that may be linked to their perceptions that women's sport is organized and presented differently to men's.

Globally, over six in ten (62%) see some inequity in women's sport. That's across areas including media

coverage, salaries, sponsorship and investment by governing bodies (see Figure 16). And those views make sense, corroborating what we already know - that many people say that a lack of coverage and marketing hampers their consumption.

Global - % of consumers who perceive inequality in these areas of women's sport
% of respondents



Figure 16

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women as compared to the treatment of men?

Broadly speaking, while men are more likely to agree with these statements than women, there's not a big difference - with one exception. Men are significantly more likely than women to believe that female athletes are not equitably paid.

Curiously, though, there are distinct differences of opinion on this matter between those who watch more women's sport than men's. Fans who skew towards women's sport are much less likely to agree with these statements than fans who predominantly watch men's sport (see Figure 17).

Global - % of consumers who perceive inequality in these areas of women's sport

By consumption of men's vs. women's vs equal consumption

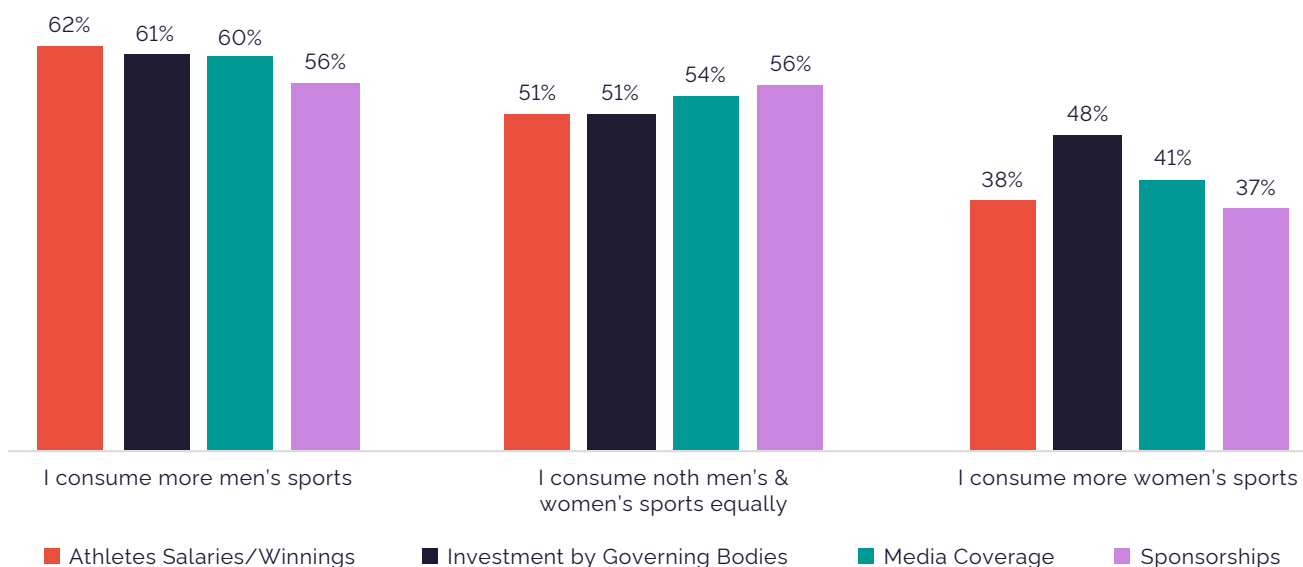


Figure 17

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women as compared to the treatment of men?

Do you consume more men's sports or women's sports?





The perceived inequality between men's and women's sports has a relationship to what is being watched. Respondents who consume more women's sports claimed less inequality, while respondents that consume more men's sports claimed higher levels of perceived inequality. Since the majority of people consume more men's sports than women's, it explains why the majority of the population believes inequality is real.

Athletes and pay

The majority of the general public in almost every market we polled agree that male and female athletes are treated inequitably when it comes to pay. Europeans are more likely to have this belief, but it is nevertheless widespread (see Figure 18). Globally, 62% believe that where an organizer puts on an event for men and women, the pay should be the same.

% of consumers who perceive inequality in pay for women's sport

% of respondents by country

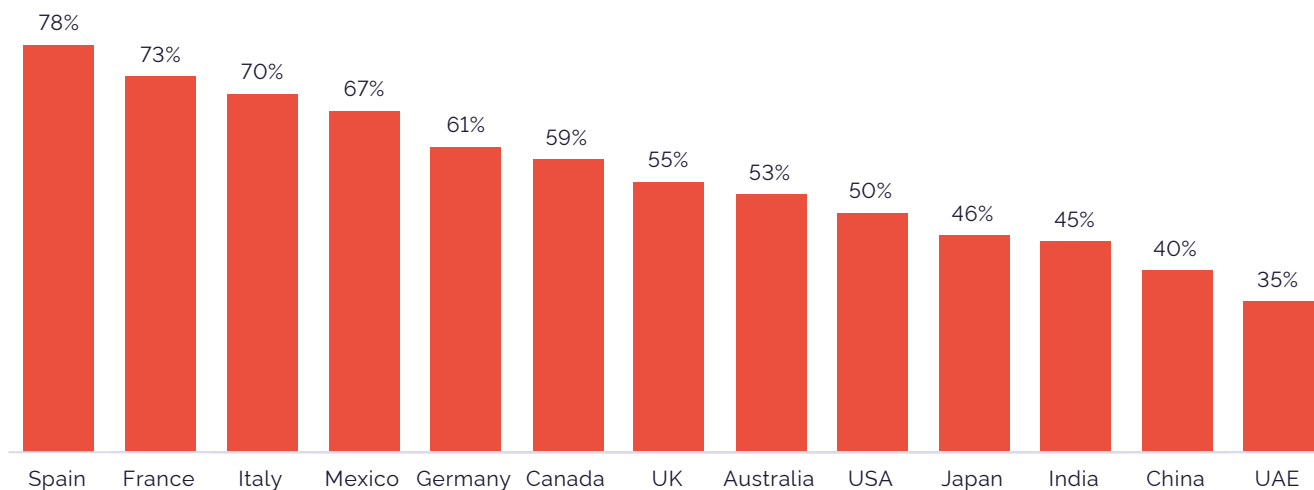


Figure 18

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women as compared to the treatment of men?



Expert view – Pay is an area where rights holders and sponsors can make an immediate difference. Paying men and women differently feeds into the narrative that women's sport is less compelling than men's – something which is ultimately unhelpful to everyone in the ecosystem.



US deep dive

Americans are slightly less likely to see inequality than the global average (60% vs. 62%) and that makes sense given that major women's sports properties like the WNBA and the NWSL earn some regular TV and/or OTT coverage. But nevertheless,

a majority perceive it across media coverage, pay, sponsorship and governing body investment (see Figure 19). But when we divide this data into men and women, we see that women are much more likely to see a difference in the way women's sport is treated.

US - % of consumers who perceive inequality in these areas of women's sport

% of US respondents

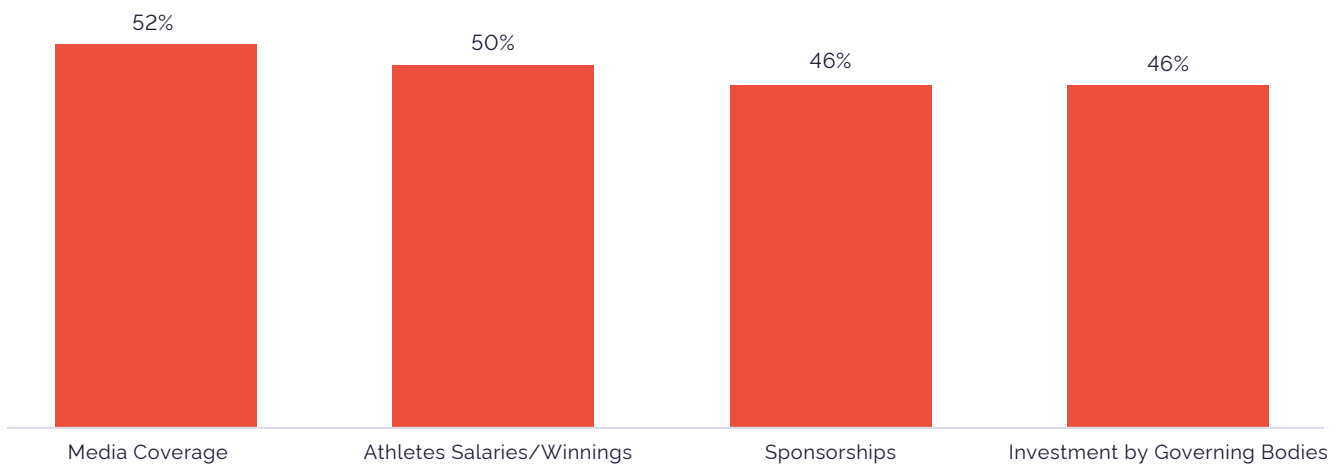


Figure 19

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women as compared to the treatment of men?

UK deep dive

Britons are slightly more likely than the global average to perceive inequality across women's sport (65% vs. 62%). A majority see disparities across media coverage, pay and sponsorship, while 48% see it in the way governing bodies invest in women (see Figure 20).

Just like in America, however, these overall figures hide gender divisions. Women are, on average, 11 points more likely to say they perceive inequality across these areas. At the same time, 66% of younger Britons (18-24) say that women's sport is not treated very or at all equitably, compared to 54% of over-55s.

UK - % of consumers who perceive inequality in these areas of women's sport % of UK respondents

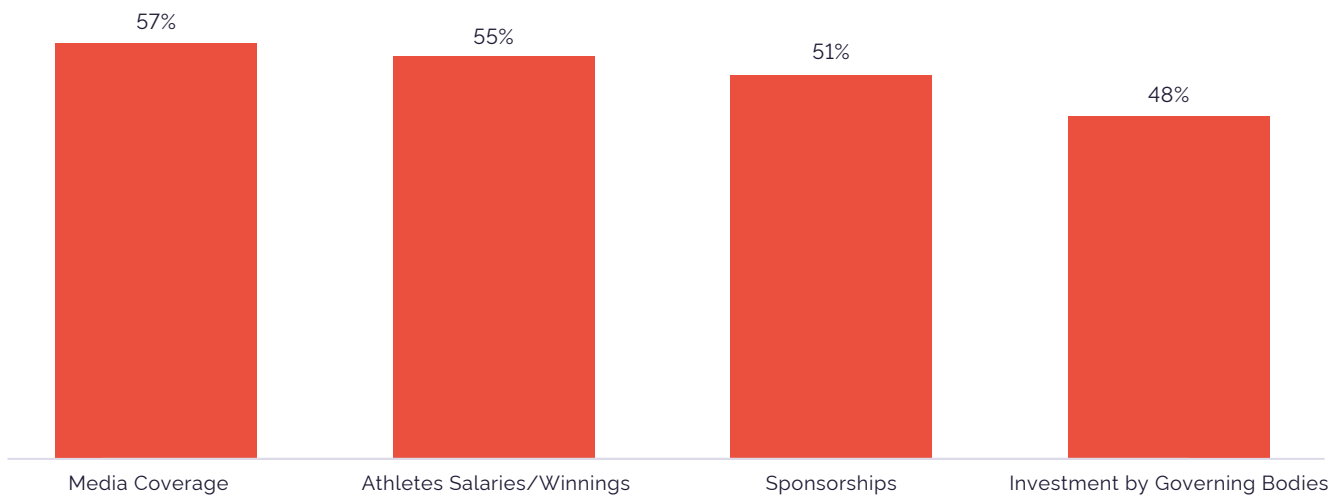


Figure 20

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women as compared to the treatment of men?





ENGAGEMENT AND INTEREST IN SPORTS, LEAGUES AND ATHLETES AROUND THE GLOBE

Stars and competitions drive interest in women's sport just as much as they do in men's sport so we asked which sports, athletes and leagues the public around the world people are most interested in.

Star sports

Globally, women's soccer has the highest following of any women's sport – it's followed by 22% of the world's public. Badminton, basketball and tennis are next at 19%, 18%, and 17% respectively (see Figure 21). These numbers vary market to market.



Within markets, there are significant variances. For example, 39% of Indonesians and 31% of Indians follow badminton - numbers which far exceed the global average.

Global - Followership of types of women's sport

% of respondents

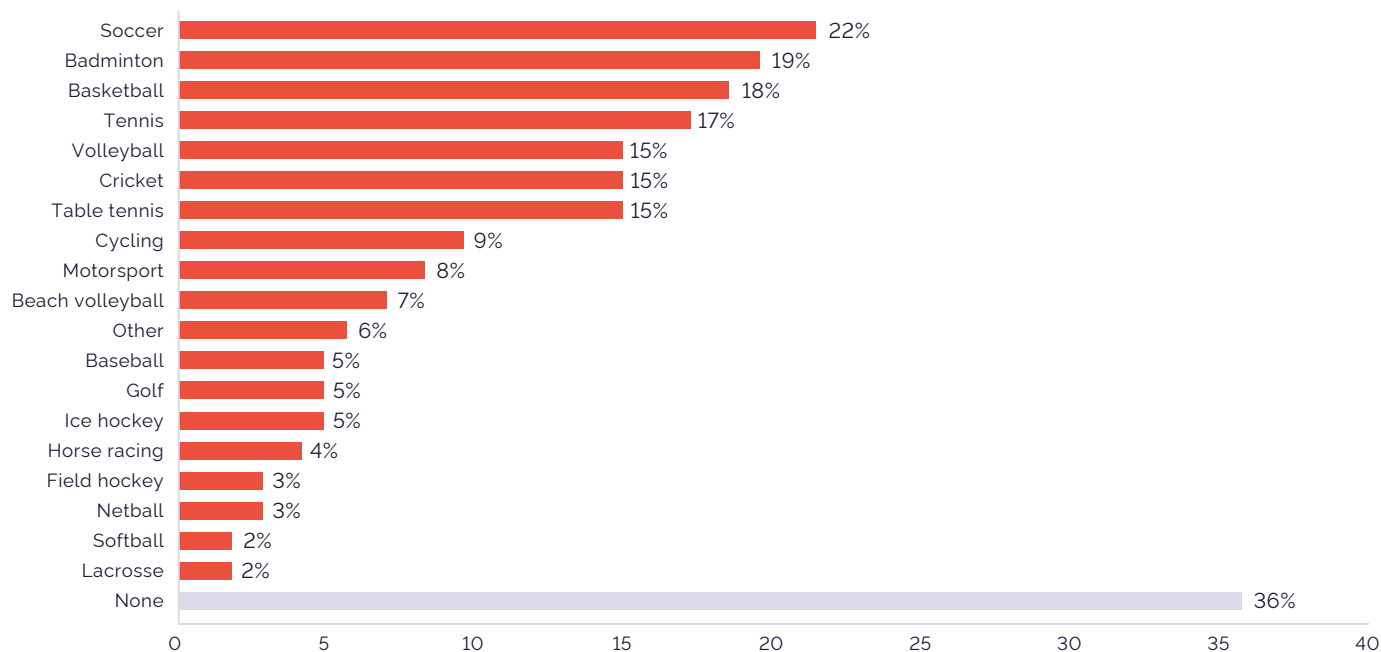


Figure 21

Which, if any, of the following sports do you watch/follow specifically when women are participating/playing?

Star athletes

Serena Williams is the most iconic women's sports star globally with a following of 34%. However, there is a large drop off from there, with Naomi Osaka (at 19%) commanding only two-thirds her fellow player's awareness.

Global – Awareness of female athletes

% of respondents

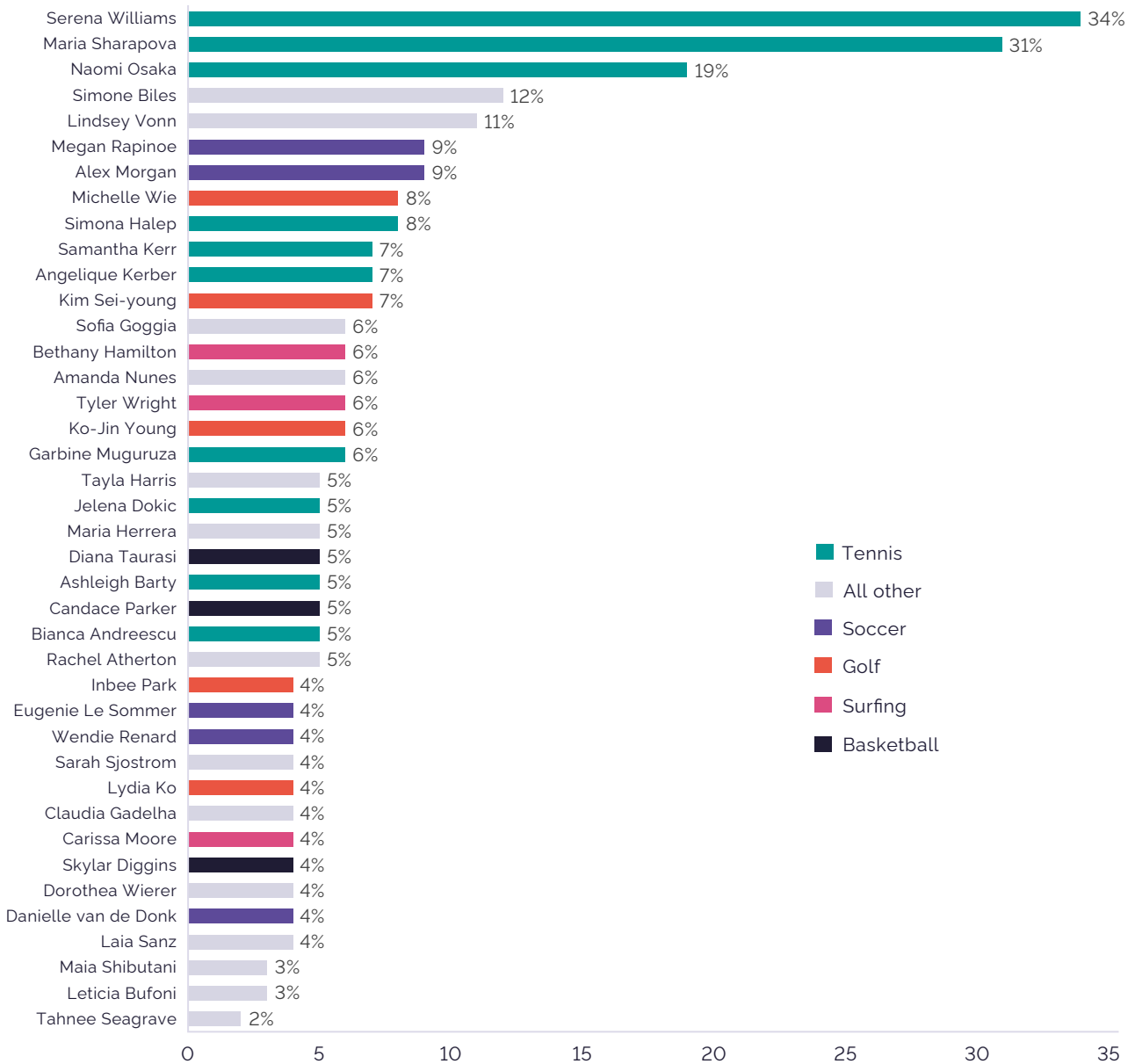


Figure 22
Which athletes are you aware of?



Expert view – Serena Williams, at nearly 40 years old, will eventually have to pass the torch to the next truly iconic sports star and it's important to the sports world that more high-profile women surface as the future leaders of women's sports.

Tennis players may have the best chance of taking that mantle. Total Grand Slam pay parity in tennis was achieved in 2007 and that, perhaps, is a factor in the profile of tennis in this list (see Figure 22).

Megan Rapinoe is the highest-placed soccer player in this ranking, with an awareness of one in ten of the public. Alex Morgan sits just below her with an almost identical awareness level. Both trail fellow American and gymnastics legend Simone Biles, who is recognized by 12% of the public globally. Michelle Wie is the highest-placed golfer, with awareness of around 8% of the global public.

Naturally, awareness of athletes varies widely between markets (for example, awareness of

Megan Rapinoe is 25% in the USA) but one athlete tops awareness in most markets – and it's Serena Williams.

Almost all the athletes in our list have higher awareness among men than women. The only exception to that is Simone Biles (+3% points among women). Few athletes have more cut through among 18-24-year-olds than among older audiences.



Expert view – Sponsors need to be careful how they choose ambassadors and be realistic about how they deploy them. Even within sports categories, the reach of individual athletes amongst age groups can vary. Awareness of a soccer player within one demographic is no guarantee of awareness within another.

The overall profile of female athletes is likely to be strongly linked to data from earlier in this report – that the most common reasons for not engaging in women's sport are that it's not marketed widely and that it's hard to find games/events to watch. Women's tennis enjoys a degree of parity with men's, with the result that its stars dominate when it comes to awareness.



Star properties

With so many tennis and soccer players towards the top of our rankings, it's perhaps no surprise that the top two sports properties for global interest are the FIFA Women's World Cup and the WTA Tour. The WNBA comes next, followed by women's esports (see Figure 23).

Global – Major competitions selected as a 'top 2 box interest'

% of respondents

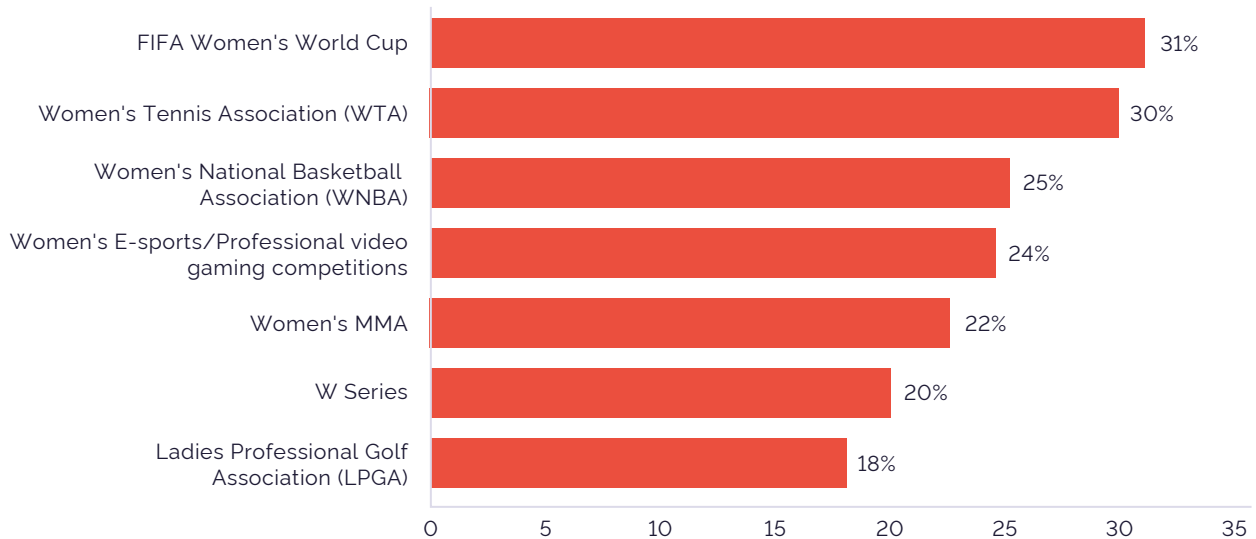


Figure 23

What is your interest in the following sports leagues/events? This is one of my TOP interests OR somewhat interested



Expert view – Given the wide spread of interest in even the highest profile properties, sponsors may be better off securing rights to individual markets, rather than global partnerships.

There's a vast amount of difference between countries – the FIFA Women's World Cup, for example, is cited as a top interest by between 14% and 46% of the public, depending on where you ask (UK and UAE respectively).

US deep dive

Americans are more likely to say they are aware of many female athletes than the global average – although admittedly the list is somewhat US-centric, reflective, as it is, of their marketing value. Eleven athletes boast awareness of one in ten or more Americans and they are spread across a healthy range of sports, which takes in tennis, gymnastics, basketball, soccer and MMA.

To reach a female audience, Serena Williams and Simone Biles offer particularly high awareness (66% and 47% respectively). But with the exception

of these two and surfer Bethany Hamilton all our other athletes are better known among men. Most higher profile athletes are more well-known among older Americans (55+) than younger ones, too.

In terms of which competitions are delivering the most, the FIFA World Cup wins out over the WTA Tour (see Figure 24) just as it does among global audiences. WNBA, NCAA, NWSL, W Series and LPGA all feature among the top female properties in the US but not globally.

US - Major competitions selected as a 'top 2 box interest'

% of US respondents

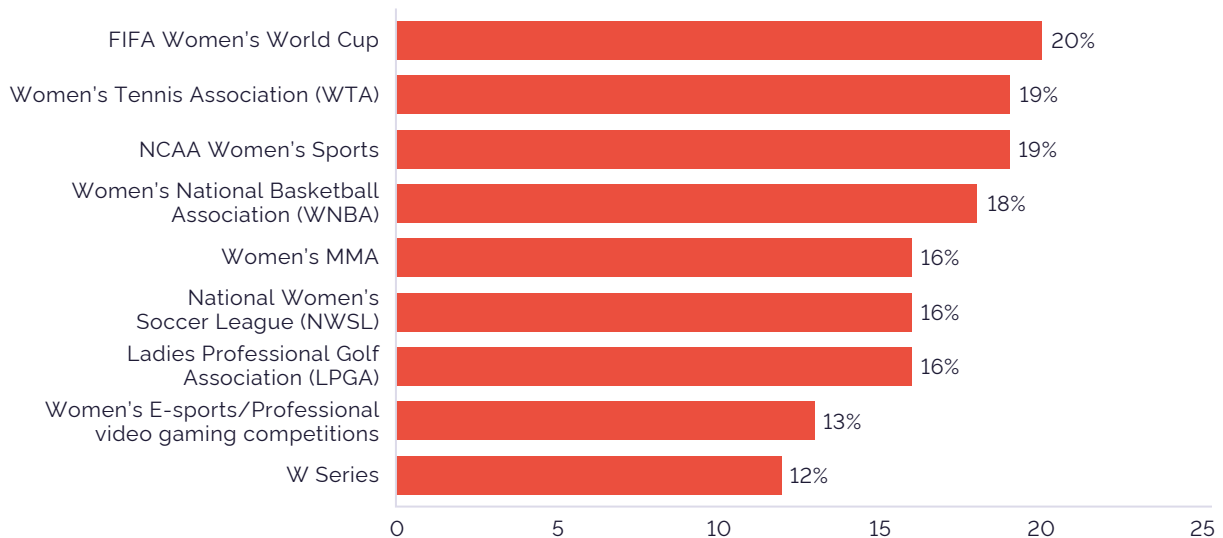


Figure 24

What is your interest in the following sports leagues/events? This is on of my TOP interests OR somewhat interested



UK deep dive

Considering Britons watch less women's sport than the global average, they do reasonably well when it comes to awareness of major stars.

More Brits are aware of Serena Williams, for example, than Americans (73% vs 60%) but that's possibly because of the special place that Wimbledon holds in British hearts. Williams is head and shoulders above Simone Biles in second

place - she enjoys awareness among one in five Brits. Biles just beats Naomi Osaka who commands 18% awareness. Biles, Rachel Atherton and Serena Williams are the only top athletes who are better-known among British women than men.

Only two competitions poll above 10% as a major interest for the British public - the WTA Tour and the FIFA Women's World Cup (see Figure 25).

UK - Major competitions selected as a 'top 2 box interest'

% of UK respondents

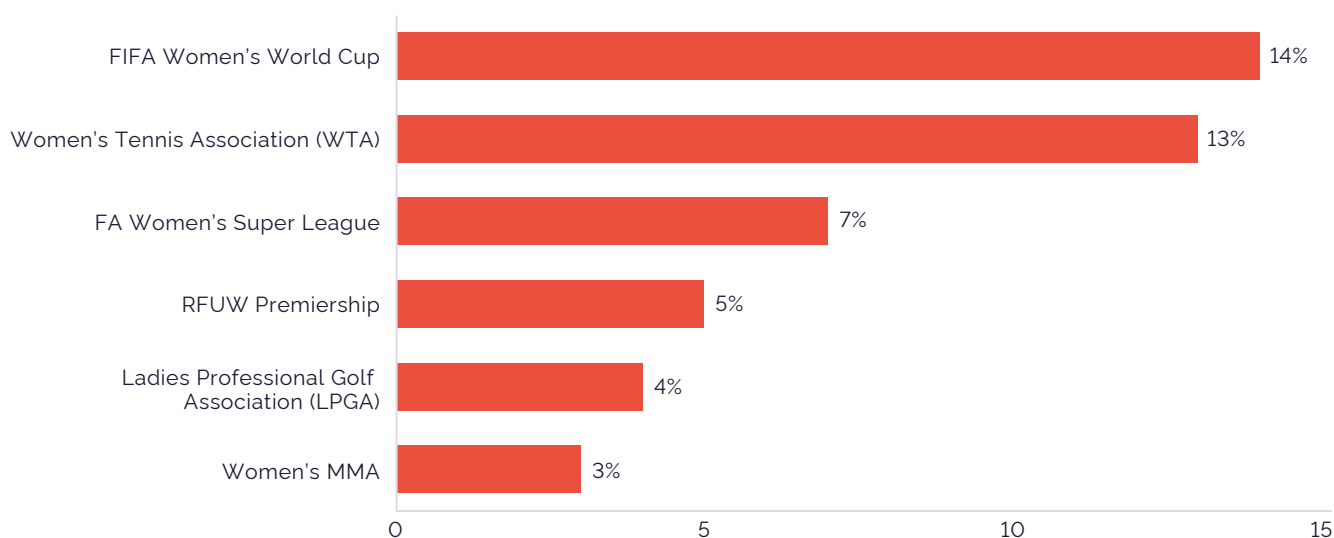


Figure 25

What is your interest in the following sports leagues/events? This is on of my TOP interests OR somewhat interested





THE FUTURE FOR WOMEN'S SPORT

The YouGov data that supports this report should give us a sense of optimism. We can see in Figure 26 that people believe the situation is improving.

Global – % of agreement that women's sport has improved – by area of sport

% of respondents

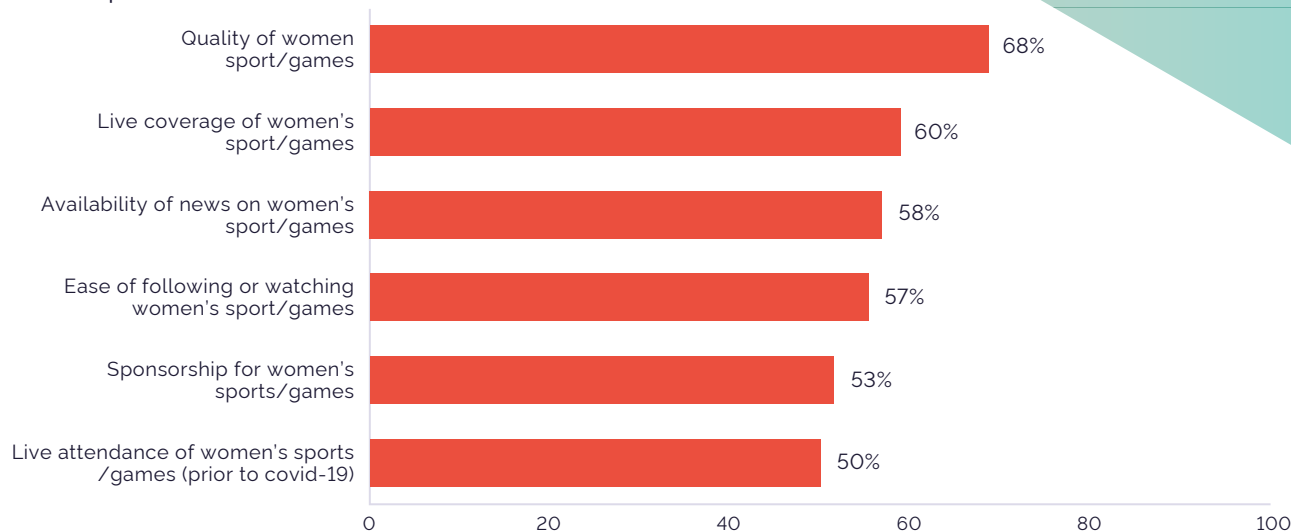


Figure 26

Do you think the following aspects of women's sport (in general) have improved or declined in the past five years?

Globally, a majority support the notion that women's sport is making headway in a range of areas. Almost seven in ten respondents say that there has been an improvement in the quality of women's games in the last five years. What's more, well over half perceive improvements in live broadcasts, the accessibility of coverage, and the sponsorship of women's sport. Exactly half say that attendance has improved. Men are 25% more likely than women, on average, to support these statements.

There are also wide differences between countries. Despite having among the lowest levels of interest in women's sport, British people are among those most likely to say they notice improvements in the sector; Germans and Americans are at the other end of the scale.

Quality of women sport/games – Improved a lot/Improved slightly in the last five years

% of respondents by country

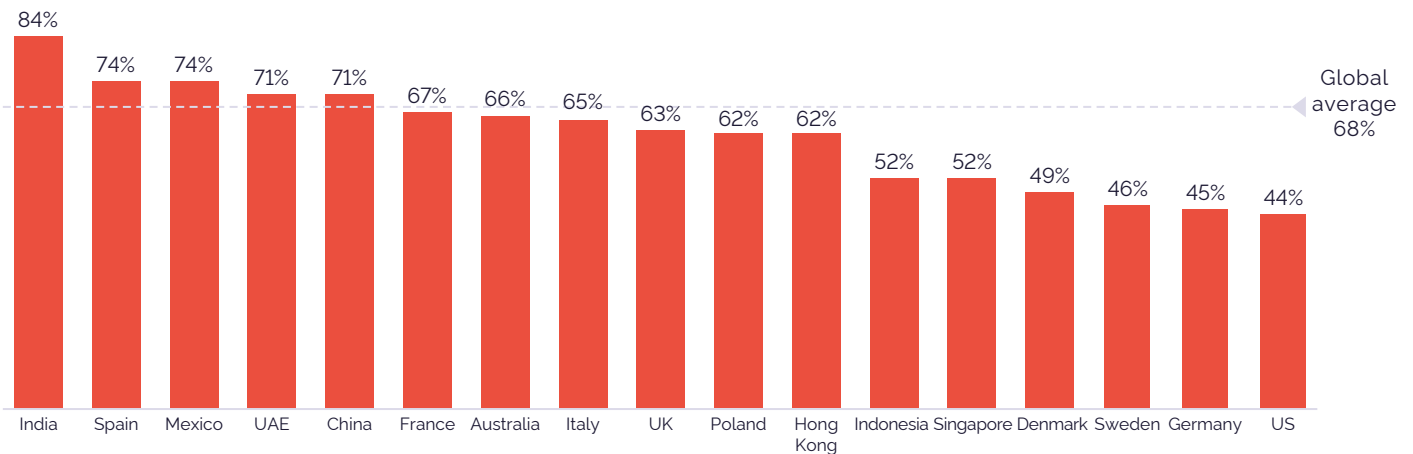


Figure 27

Do you think the following aspects of women's sport (in general) have improved or declined in the past five years?

Sponsors' role in the future

There appears to be good potential rewards for brands considering support for sport. Given the relative costs of sponsoring men's vs. women's sport, there is real value in the latter.

Globally, when it comes to sponsors, respondents are slightly more likely to think more positively of a brand which supports men's sport than women's (38% vs 33%). But women are significantly more likely to look favorably on a brand's support of women's professional sport than are men (36% vs. 31%).

It's worth remarking that women tend to have household purchasing power. And given

that 36% of women look favorably on a brand sponsoring women's professional sport (compared to just 26% of women who do the same for brand sponsoring men's pro sport), the former looks a good bet for marketers.

Amongst women who believe that playing sport or having children that play is a big factor in getting involved in women's sport, there's an even more receptive potential audience for brands considering partnerships with athletes, teams, and leagues in women's sports. Across all types of sports, this group is more likely to consider a brand association of this type favorably (see Figure 27) compared to a similar association within men's sport.

Global – % who would think more positively of a brand supporting sport in these areas

Among females who believe engagement is driven by women who play(ed) sport or whose children play(ed) sport

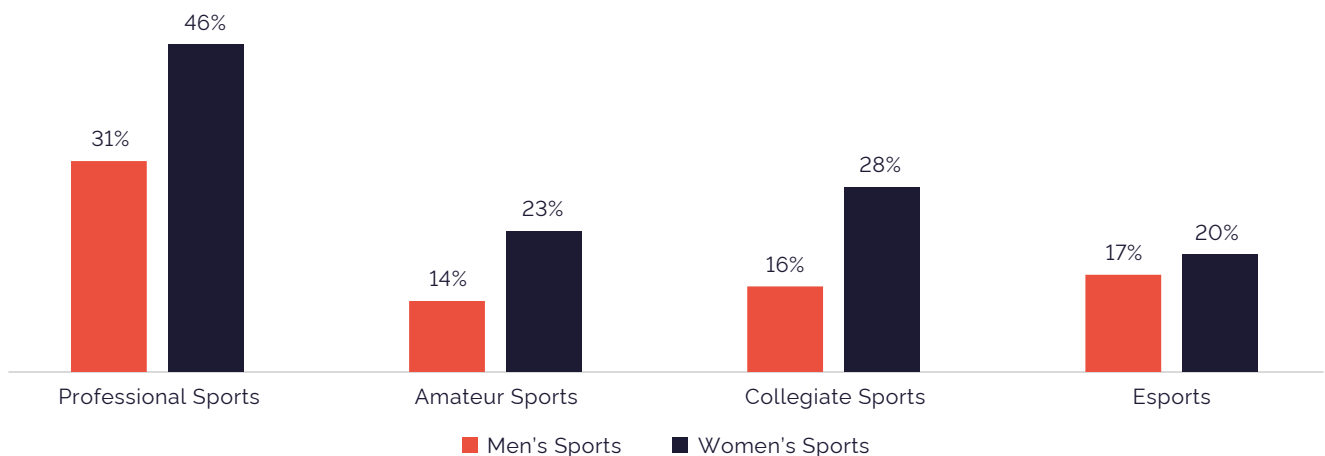


Figure 28

Which of the following sports associations would make you think more positively about a brand?

CONCLUSION

According to the global public, women's sport is on the up – consumers perceive improvements in a range of areas, from quality to media coverage.

Nevertheless, there are still big differences in the way people both perceive and consume women's sport. They are less likely to watch it, and less likely to consider that is treated the same as men's sport.

Yet, for most, the caliber of women's sport is not in doubt. Only a small minority cite speed, quality and physicality as reasons not to tune in. In fact, a third of people say that one solution

is straightforward – if there were more sports on the TV, they would watch it.

Instead, people are more likely to tell us that a lack of coverage, its low profile and a lack of knowledge is holding them back.

This, of course, is a classic marketing conundrum – a solid product and unmet demand. The challenge for sports marketers is to find a way to bring them together. To that end, we hope the data we present in our report represents a useful starting point.



MARKET SNAPSHOTS

APPENDIX A: APAC REGION

A1: Followership of men's & women's sports

Which sports do you watch or follow?

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
Men's professional sports	49%	34%	46%	35%
Women's professional sports	26%	17%	25%	14%
Men's amateur sports	9%	12%	14%	8%
Men's collegiate/university sports	5%	12%	14%	7%
Women's amateur sports	7%	8%	11%	6%
Women's collegiate/university sports	4%	8%	11%	3%
None of these	44%	45%	37%	61%

A2: Relative consumption of men's and women's sports

Do you consume more men's sports or women's sports?

	Australia	China	India	Japan
Sample size	260	167	242	152
I consume more men's sports	56%	44%	49%	51%
I consume both men's and women's sports equally	38%	37%	36%	33%
I consume more women's sports	4%	16%	14%	11%
Don't know	1%	3%	1%	5%



A3: Reasons why people don't engage in women's sports?

Which, if any, of the following, do you believe are reasons why people don't engage with women's sports as much as men's sports?

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
Less media coverage (reporting, highlights, etc.)	46%	34%	47%	32%
Lack of knowledge about the teams and/or athletes	33%	31%	41%	18%
Limited marketing	32%	22%	43%	9%
Cannot easily find games to watch on TV, online, or other channels	31%	21%	32%	20%
Fewer people around me are interested in it	23%	29%	31%	17%
The coverage is not high enough quality	20%	27%	30%	12%
Skill level is not as high	22%	18%	22%	24%
Games are slower	20%	13%	19%	8%
Games are not as physical	16%	31%	15%	13%
Don't know	14%	12%	11%	24%
Not applicable – I believe people engage with women's sports as much as men's sports	10%	10%	7%	12%

A4: Reasons why people become interested in women's sports

Which, if any, of the following reasons do you think explain why people become interested in women's sports? Please select all that apply.

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
Watched international events (e.g., Olympics, FIFA World Cup) and continued support into local leagues	42%	42%	48%	35%
Played sport(s) as a child and interest continued	45%	34%	35%	22%
Have/Had children who play/played sport	47%	25%	28%	19%
Friends/Family introduced them to a player/team/league	40%	32%	37%	11%
Saw highlights that sparked their interest	34%	32%	32%	19%
There's a team/event based in their area	31%	24%	26%	25%
Don't know	18%	20%	21%	34%
Other	3%	1%	0%	2%

A5: Perceived sexism in women's sports – great deal or some

To what extent, if at all, do you think there is sexism in each of the following?

	Australia	China	India	Japan
Sample size	1034	1030	1008	1007
Professional sports	59%	46%	43%	50%
Amateur sports	50%	37%	39%	47%
Collegiate/University sports	49%	32%	38%	46%

A6: Equity between men's and women's sport – not at all/not very

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women, as compared to men?

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
Media coverage	51%	42%	47%	46%
Athlete salaries/winnings	53%	40%	45%	46%
Sponsorship	45%	44%	44%	38%
Investment by governing bodies	42%	42%	44%	40%

A7: League interest top 3 box – one of my top interests/somewhat interested/a little bit interested

What is your level of interest in the following sports leagues/events? Please select one option in each row.

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
FIFA Women's World Cup	35%	54%	66%	36%
Women's Tennis Association (WTA)	48%	56%	65%	36%
Women's National Basketball Association (WNBA)	28%	56%	58%	15%
Women's MMA	23%	50%	51%	11%
Ladies Professional Golf Association (LPGA)	26%	36%	48%	27%
Women's E-sports/Professional video gaming competitions	20%	54%	54%	12%
W Series	18%	45%	51%	20%
AFLW	39%	-	-	-
Nadeshiko League Division 1	-	-	-	31%
W-League Soccer	27%	-	-	-
Japan Women's Baseball League	-	-	-	20%
Other	3%	1%	0%	2%

A8: Awareness of female athletes

Which, if any, of the following athletes are you aware of?

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
Serena Williams	67%	9%	40%	38%
Maria Sharapova	56%	15%	36%	43%
Naomi Osaka	41%	12%	21%	70%
Lindsey Vonn	7%	4%	7%	3%
Angelique Kerber	17%	4%	7%	2%
Simone Biles	11%	5%	8%	2%
Simona Halep	19%	5%	9%	4%
Megan Rapinoe	6%	5%	7%	2%
Alex Morgan	5%	4%	12%	5%
Samantha Kerr	30%	4%	11%	4%
Garbine Muguruza	8%	4%	6%	2%
Michelle Wie	10%	6%	7%	14%
Jelena Dokic	43%	3%	8%	4%
Ashleigh Barty	53%	3%	7%	1%
Bianca Andreescu	5%	3%	6%	1%
Sofia Goggia	3%	5%	10%	1%
Amanda Nunes	7%	4%	9%	1%
Maria Herrera	5%	4%	7%	2%
Tayla Harris	18%	6%	7%	2%
Bethany Hamilton	8%	6%	8%	2%
Kim Sei-young	4%	7%	9%	5%
Ko-Jin Young	5%	5%	9%	2%
Candace Parker	6%	3%	6%	1%
Tyler Wright	11%	6%	10%	1%
Laia Sanz	1%	2%	6%	1%
Wendie Renard	2%	4%	5%	1%
Eugenie Le Sommer	1%	5%	4%	1%
Dorothea Wierer	1%	3%	6%	1%
Rachel Atherton	3%	5%	7%	1%
Lydia Ko	8%	4%	5%	3%
Diana Taurasi	2%	4%	8%	1%
Sarah Sjostrom	4%	4%	6%	2%
Inbee Park	4%	5%	5%	4%
Danielle van de Donk	3%	4%	4%	1%
Skylar Diggins	3%	4%	5%	1%
Carissa Moore	4%	4%	6%	1%
Leticia Bufoni	2%	3%	4%	1%
Claudia Gadelha	2%	3%	8%	1%
Maia Shibutani	2%	4%	5%	2%
Tahnee Seagrave	3%	2%	5%	1%
None of these athletes	17%	51%	28%	24%

A9: Sports associations driving positive attitudes towards brands

Which of the following sports associations would make you think more positively about a brand?

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
Women's professional sports	37%	34%	40%	32%
Men's professional sports	35%	40%	53%	31%
Women's amateur sports	18%	12%	16%	16%
Women's collegiate sports	13%	17%	17%	11%
Men's amateur sports	13%	12%	17%	14%
Men's esports	10%	28%	24%	6%
Men's collegiate sports	9%	14%	18%	9%
Women's esports	9%	19%	13%	6%
None of these	46%	28%	25%	52%

A10: Beliefs in ways women should support women's sports

In what ways, if at all, do you think female celebrities, female athletes, or other high-profile women, should be involved in supporting women's professional sports?

	Australia	China	India	Japan
Sample size	1034	1030	1007	1008
Post on social media	41%	43%	47%	19%
Attend games as fans	46%	31%	44%	26%
Become part of league advisory boards	41%	34%	41%	16%
Be an announcer/commentator	42%	31%	34%	22%
Invest as owners of teams	35%	30%	41%	17%
Not sure	26%	24%	19%	41%
They should not be involved	5%	1%	4%	6%
None of these	46%	28%	25%	52%

A11: Attitudes towards women's sports in past five years – improved a lot/slightly

Do you think the following aspects of women's sport (in general) have improved or declined in the past five years?

	Australia	China	Hong Kong	India	Indonesia	Singapore
Sample size	1028	1014	505	1015	1043	1015
Quality of women sport/games	66%	71%	62%	84%	52%	52%
Live coverage of women's sport/games	70%	63%	51%	76%	45%	42%
Ease of following or watching women's sport/games	63%	60%	55%	74%	46%	44%
Availability of news on women's sport/games	66%	61%	49%	74%	44%	43%
Sponsorship for women's sports/games	60%	54%	44%	71%	43%	38%
Live attendance of women's sports/games (prior to covid-19)	60%	52%	44%	64%	41%	34%

A12: Drivers of interest in women's sports

Which of the following options applies to your current support of women's sporting events?

	Australia	China	Hong Kong	India	Indonesia	Singapore
Sample size	1028	1014	505	1015	1043	1015
I watch or follow women's large sporting events like World cups, Olympics and Common wealth games.	32%	26%	29%	31%	25%	16%
I watch or follow women sporting events whenever my country is playing.	20%	32%	20%	29%	26%	9%
I watch or follow women sporting events whenever my favourite player/athlete is playing.	13%	22%	17%	25%	20%	8%
I watch or follow women sporting events when my favourite team is playing	16%	19%	16%	23%	18%	7%
I follow women's sport via Digital and social media platforms	8%	22%	17%	23%	20%	9%
I watch or follow women sporting events whenever UAE is playing	0%	0%	0%	0%	0%	0%
Other	23%	11%	9%	9%	11%	22%
Don't know	30%	26%	34%	25%	27%	46%

A13: Attitudes towards women's sports – definitely/tend to agree

Please state your level of agreement with the following statements.

	Australia	China	Hong Kong	India	Indonesia	Singapore
Sample size	1028	1014	505	1015	1043	1015
Women officials (referees) are just as good as men officials	67%	49%	66%	71%	60%	53%
Women sports managers are equally as skilled as male sport team managers	64%	51%	62%	72%	60%	50%
Where a sports body organises an event for men and an equivalent event for women, the prize money on offer should be the same	59%	58%	55%	72%	62%	55%
I would like to see more exposure for women's sport	45%	45%	30%	73%	52%	37%
If there was more women's sport on TV, I would watch it	27%	41%	34%	59%	43%	27%
I think more of a brand if I see that it sponsors women's sport	27%	39%	33%	56%	44%	28%

APPENDIX B: EUROPE REGION

B1: Followership of men's & women's sports

Which, if any, of the following sports do you watch or follow?

	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
Men's professional sports	39%	40%	54%	59%	39%
Women's professional sports	23%	18%	33%	32%	12%
Men's amateur sports	9%	12%	9%	10%	5%
Men's collegiate/university sports	4%	4%	4%	5%	1%
Women's amateur sports	7%	6%	8%	8%	1%
Women's collegiate/university sports	2%	2%	3%	3%	1%
None of these	51%	53%	36%	34%	59%

B2: Relative consumption of men's and women's sports

Do you consume more men's sports or women's sports?

	France	Germany	Italy	Spain	UK
Sample size	234	373	325	342	273
I consume more men's sports	62%	50%	47%	53%	78%
I consume both men's and women's sports equally	34%	44%	44%	41%	17%
I consume more women's sports	4%	6%	7%	5%	2%
Don't know	0%	0%	2%	1%	2%



B3: Reasons why people don't engage in women's sports?

Which, if any, of the following, do you believe are reasons why people don't engage with women's sports as much as men's sports?

	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
Less media coverage (reporting, highlights, etc.)	47%	38%	45%	60%	45%
Lack of knowledge about the teams and/or athletes	32%	31%	39%	43%	38%
Limited marketing	25%	24%	33%	39%	31%
Cannot easily find games to watch on TV, online, or other channels	29%	23%	33%	40%	31%
Fewer people around me are interested in it	14%	22%	16%	23%	23%
The coverage is not high enough quality	26%	15%	13%	34%	19%
Skill level is not as high	10%	12%	12%	14%	19%
Games are slower	11%	14%	12%	11%	14%
Games are not as physical	10%	9%	11%	9%	12%
Don't know	19%	17%	13%	9%	22%
Not applicable – I believe people engage with women's sports as much as men's sports	10%	15%	8%	4%	8%

B4: Reasons why people become interested in women's sports

Which, if any, of the following reasons do you think explain why people become interested in women's sports? Please select all that apply.

	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
Watched international events (e.g., Olympics, FIFA World Cup) and continued support into local leagues	36%	29%	39%	42%	41%
Played sport(s) as a child and interest continued	28%	34%	40%	44%	38%
Have/Had children who play/played sport	28%	26%	38%	44%	38%
Friends/Family introduced them to a player/team/league	20%	28%	25%	31%	33%
Saw highlights that sparked their interest	31%	23%	22%	35%	26%
There's a team/event based in their area	22%	25%	33%	38%	29%
Don't know	31%	34%	19%	14%	32%
Other	2%	1%	1%	3%	3%

B5: Perceived sexism in women's sports – great deal or some

To what extent, if at all, do you think there is sexism in each of the following?

	France	Germany	Italy	Spain	UK
Unweighted N	1037	2084	1047	1078	2189
Professional sports	67%	33%	63%	72%	54%
Amateur sports	58%	36%	52%	61%	44%
Collegiate/University sports	54%	36%	50%	58%	37%

B6: Equity between men's and women's sport – not at all/not very

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women, as compared to men?

	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
Media coverage	70%	56%	73%	78%	57%
Athlete salaries/winnings	73%	61%	70%	78%	55%
Sponsorship	58%	54%	69%	74%	51%
Investment by governing bodies	63%	49%	68%	74%	48%

B7: League interest top 3 box – one of my top interests/somewhat interested/a little bit interested

What is your level of interest in the following sports leagues/events? Please select one option in each row.

Top 3 box	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
FIFA Women's World Cup	46%	48%	46%	49%	29%
Women's Tennis Association (WTA)	32%	35%	43%	50%	27%
Women's National Basketball Association (WNBA)	22%	24%	27%	36%	7%
Women's MMA	21%	26%	24%	29%	9%
Ladies Professional Golf Association (LPGA)	15%	22%	18%	23%	11%
Women's E-sports/Professional video gaming competitions	16%	21%	27%	24%	5%
W Series	15%	23%	20%	26%	5%
Primera Division	-	-	-	64%	-
Serie A TIMvision	-	-	55%	-	-
Liga Femenina	-	-	-	50%	-
Italian Women's Volleyball League Serie A	-	-	45%	-	-
Frauen Bundesliga	-	42%	-	-	-
Handball-Bundesliga Frauen	-	33%	-	-	-
Division 1 Femenine	32%	-	-	-	-
FA Women's Super League	-	-	-	-	17%
RFUW Premiership	-	-	-	-	13%
Kia Super League (KSL)	-	-	-	-	4%
AENA Super Cup	-	-	-	-	4%

B8: Awareness of female athletes

Which, if any, of the following athletes are you aware of?

	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
Serena Williams	58%	50%	55%	71%	73%
Maria Sharapova	42%	22%	50%	62%	59%
Naomi Osaka	12%	11%	11%	16%	18%
Lindsey Vonn	12%	30%	15%	7%	10%
Angelique Kerber	8%	47%	6%	8%	14%
Simone Biles	6%	4%	10%	20%	20%
Simona Halep	15%	9%	12%	17%	16%
Megan Rapinoe	16%	7%	4%	12%	15%
Alex Morgan	10%	5%	4%	11%	12%
Samantha Kerr	7%	6%	7%	11%	6%
Garbine Muguruza	7%	4%	7%	50%	7%
Michelle Wie	3%	2%	2%	3%	11%
Jelena Dokic	6%	3%	6%	8%	9%
Ashleigh Barty	4%	3%	5%	4%	8%
Bianca Andreescu	4%	3%	7%	6%	2%
Sofia Goggia	2%	4%	35%	3%	1%
Amanda Nunes	2%	2%	6%	5%	4%
Maria Herrera	5%	3%	8%	11%	3%
Tayla Harris	3%	3%	4%	5%	1%
Bethany Hamilton	3%	2%	3%	5%	3%
Kim Sei-young	2%	2%	2%	4%	2%
Ko-Jin Young	3%	2%	3%	5%	2%
Candace Parker	5%	2%	2%	4%	2%
Tyler Wright	2%	2%	3%	3%	1%
Bethany Hamilton	3%	2%	3%	5%	3%
Kim Sei-young	2%	2%	2%	4%	2%
Ko-Jin Young	3%	2%	3%	5%	2%
Candace Parker	5%	2%	2%	4%	2%
Tyler Wright	2%	2%	3%	3%	1%
Laia Sanz	2%	1%	3%	30%	1%
Wendie Renard	26%	1%	3%	2%	1%
Eugenie Le Sommer	25%	2%	2%	2%	1%
Dorothea Wierer	4%	10%	7%	2%	1%
Rachel Atherton	2%	1%	2%	2%	8%
Lydia Ko	1%	1%	3%	3%	2%
Diana Taurasi	1%	1%	6%	4%	0%
Sarah Sjostrom	3%	1%	4%	3%	2%
Inbee Park	1%	1%	1%	1%	2%
Danielle van de Donk	1%	2%	3%	4%	3%
Skylar Diggins	2%	1%	2%	2%	1%
Carissa Moore	2%	1%	4%	3%	0%
Leticia Bufoni	2%	1%	4%	4%	0%
Claudia Gadelha	1%	1%	3%	3%	0%
Maia Shibutani	1%	0%	2%	3%	1%
Tahnee Seagrave	1%	1%	2%	2%	1%
None of these athletes	29%	35%	26%	15%	21%

B9: Sports associations driving positive attitudes towards brands

Which of the following sports associations would make you think more positively about a brand?

	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
Women's professional sports	28%	18%	39%	44%	18%
Men's professional sports	17%	18%	37%	28%	18%
Women's amateur sports	18%	13%	12%	26%	11%
Women's collegiate sports	13%	8%	9%	27%	8%
Men's amateur sports	10%	11%	9%	14%	8%
Men's esports	6%	5%	8%	9%	4%
Men's collegiate sports	5%	5%	6%	13%	4%
Women's esports	6%	5%	8%	15%	5%
None of these	56%	63%	41%	38%	71%

B10: Beliefs in ways women should support women's sports

In what ways, if at all, do you think female celebrities, female athletes, or other high-profile women, should be involved in supporting women's professional sports?

	France	Germany	Italy	Spain	UK
Sample size	1037	2084	1047	1078	2189
Post on social media	30%	30%	36%	51%	32%
Attend games as fans	29%	26%	23%	42%	37%
Become part of league advisory boards	23%	27%	39%	50%	32%
Be an announcer/commentator	27%	29%	30%	48%	33%
Invest as owners of teams	22%	18%	25%	37%	30%
Not sure	34%	40%	22%	14%	41%
They should not be involved	8%	7%	3%	3%	4%

B11: Attitudes towards women's sports in past five years – improved a lot/slightly

Do you think the following aspects of women's sport (in general) have improved or declined in the past five years?

	Denmark	France	Germany	Italy	Poland	Spain	Sweden	UK
Sample size	1096	1025	1017	1030	1020	1020	1013	2029
Quality of women sport/games	49%	67%	45%	65%	62%	74%	46%	63%
Live coverage of women's sport/games	48%	62%	37%	51%	54%	66%	42%	68%
Ease of following or watching women's sport/games	45%	59%	33%	47%	57%	62%	39%	58%
Availability of news on women's sport/games	41%	55%	32%	47%	53%	65%	40%	58%
Sponsorship for women's sports/games	33%	50%	29%	44%	48%	61%	30%	52%
Live attendance of women's sports/games (prior to covid-19)	33%	53%	25%	39%	47%	57%	29%	53%

B12: Drivers of interest in women's sports

Which of the following options applies to your current support of women's sporting events?

	Denmark	France	Germany	Italy	Poland	Spain	Sweden	UK
Sample size	1096	1025	1017	1030	1020	1020	1013	2029
I watch or follow women's large sporting events like World cups, Olympics and Common wealth games.	39%	25%	23%	26%	24%	27%	32%	24%
I watch or follow women sporting events whenever my country is playing.	20%	24%	12%	15%	22%	18%	25%	10%
I watch or follow women sporting events whenever my favourite player/athlete is playing.	6%	8%	6%	8%	16%	10%	11%	5%
I watch or follow women sporting events when my favourite team is playing	6%	10%	5%	8%	13%	13%	11%	5%
I follow women's sport via Digital and social media platforms	7%	6%	4%	8%	9%	14%	10%	4%
Other	19%	26%	27%	18%	12%	29%	26%	39%
Don't know	31%	29%	39%	41%	42%	26%	25%	29%

B13: Attitudes towards women's sports – definitely/tend to agree

Please state your level of agreement with the following statements.

	Denmark	France	Germany	Italy	Poland	Spain	Sweden	UK
Sample size	1096	1025	1017	1030	1020	1020	1013	2029
Women officials (referees) are just as good as men officials	58%	79%	65%	76%	68%	77%	62%	69%
Women sports managers are equally as skilled as male sport team managers	54%	79%	64%	75%	67%	80%	62%	64%
Where a sports body organises an event for men and an equivalent event for women, the prize money on offer should be the same	57%	78%	58%	75%	64%	73%	56%	61%
I would like to see more exposure for women's sport	41%	64%	38%	63%	38%	64%	31%	41%
If there was more women's sport on TV, I would watch it	22%	35%	23%	42%	35%	43%	19%	20%
I think more of a brand if I see that it sponsors women's sport	31%	28%	20%	26%	23%	29%	15%	21%

APPENDIX C: NORTH AMERICA – CANADA, MEXICO, AND THE UNITED STATES

C1: Followership of men's & women's sports

Which, if any, of the following sports do you watch or follow?

	Canada	Mexico	United States
Sample size	1001	1009	1325
Men's professional sports	45%	54%	38%
Women's professional sports	21%	26%	14%
Men's amateur sports	12%	11%	10%
Men's collegiate/university sports	8%	10%	24%
Women's amateur sports	7%	10%	7%
Women's collegiate/university sports	5%	10%	12%
None of these	48%	32%	48%

C2: Relative consumption of Men's and Women's sports

Do you consume more men's sports or women's sports?

	Canada	Mexico	United States
Sample size	192	264	220
I consume more men's sports	71%	43%	66%
I consume both men's and women's sports equally	23%	51%	19%
I consume more women's sports	3%	6%	11%
Don't know	3%	0%	3%



C3: Reasons why people don't engage in women's sports?

Which, if any, of the following, do you believe are reasons why people don't engage with women's sports as much as men's sports?

	Canada	Mexico	United States
Sample size	1001	1009	1325
Less media coverage (reporting, highlights, etc.)	45%	51%	40%
Lack of knowledge about the teams and/or athletes	41%	41%	34%
Limited marketing	34%	40%	31%
Cannot easily find games to watch on TV, online, or other channels	32%	39%	28%
Fewer people around me are interested in it	24%	26%	23%
The coverage is not high enough quality	18%	24%	16%
Skill level is not as high	16%	11%	20%
Games are slower	13%	10%	13%
Games are not as physical	13%	9%	15%
Don't know	16%	7%	19%
Not applicable – I believe people engage with women's sports as much as men's sports	11%	7%	11%

C4: Reasons why people become interested in women's sports

Which, if any, of the following reasons do you think explain why people become interested in women's sports? Please select all that apply.

	Canada	Mexico	United States
Sample size	1001	1009	1325
Watched international events (e.g., Olympics, FIFA World Cup) and continued support into local leagues	48%	52%	37%
Played sport(s) as a child and interest continued	40%	41%	42%
Have/Had children who play/played sport	42%	43%	43%
Friends/Family introduced them to a player/team/league	34%	36%	33%
Saw highlights that sparked their interest	28%	33%	25%
There's a team/event based in their area	26%	31%	30%
Don't know	22%	8%	26%
Other	2%	1%	3%

C5: Perceived sexism in women's sports – great deal or some

To what extent, if at all, do you think there is sexism in each of the following?

	Canada	Mexico	United States
Sample size	1001	1009	1325
Professional sports	61%	68%	53%
Amateur sports	56%	62%	48%
Collegiate/University sports	57%	58%	50%

C6: Equity between men's and women's sport – not at all/not very

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women, as compared to men?

	Canada	Mexico	United States
Sample size	1001	1009	1325
Media coverage	56%	67%	52%
Athlete salaries/winnings	59%	67%	50%
Sponsorship	51%	64%	46%
Investment by governing bodies	49%	68%	46%

C7: League interest top 3 box – one of my top interests/somewhat interested/a little bit interested

What is your level of interest in the following sports leagues/events? Please select one option in each row.

	Canada	Mexico	United States
Sample size	1001	1009	1325
FIFA Women's World Cup	36%	65%	32%
Women's Tennis Association (WTA)	40%	53%	33%
Women's National Basketball Association (WNBA)	26%	52%	34%
Women's MMA	22%	63%	28%
Ladies Professional Golf Association (LPGA)	33%	41%	26%
Women's E-sports/Professional video gaming competitions	16%	45%	21%
W Series	16%	46%	20%
Liga MX Femenil	–	63%	–
Canadian Women's Hockey League	43%	–	–
NCAA Women's Sports	–	–	34%
National Women's Soccer League (NWSL)	–	–	29%
National Ringette League (NRL)	12%	–	–



C8: Awareness of female athletes

Which, if any, of the following athletes are you aware of?

	Canada	Mexico	United States
Sample size	1001	1009	1325
Serena Williams	63%	52%	60%
Maria Sharapova	46%	43%	40%
Naomi Osaka	18%	13%	23%
Lindsey Vonn	25%	4%	35%
Angelique Kerber	8%	6%	4%
Simone Biles	18%	9%	42%
Simona Halep	10%	9%	7%
Megan Rapinoe	10%	8%	25%
Alex Morgan	5%	16%	14%
Samantha Kerr	6%	8%	6%
Garbine Muguruza	4%	6%	4%
Michelle Wie	19%	6%	22%
Jelena Dokic	4%	5%	4%
Ashleigh Barty	6%	3%	4%
Bianca Andreescu	37%	4%	5%
Sofia Goggia	3%	5%	3%
Amanda Nunes	7%	8%	10%
Maria Herrera	3%	10%	4%
Tayla Harris	2%	7%	4%
Bethany Hamilton	5%	5%	10%
Kim Sei-young	5%	6%	6%
Ko-Jin Young	6%	7%	5%
Candace Parker	4%	4%	11%
Tyler Wright	4%	5%	4%
Laia Sanz	2%	4%	2%
Wendie Renard	2%	2%	2%
Eugenie Le Sommer	3%	3%	2%
Dorothea Wierer	1%	5%	2%
Rachel Atherton	2%	3%	3%
Lydia Ko	7%	3%	3%
Diana Taurasi	2%	4%	8%
Sarah Sjostrom	3%	4%	4%
Inbee Park	6%	3%	4%
Danielle van de Donk	2%	3%	3%
Skylar Diggins	2%	2%	7%
Carissa Moore	1%	4%	3%
Leticia Bufoni	2%	5%	3%
Claudia Gadelha	1%	3%	2%
Maia Shibutani	2%	3%	2%
Tahnee Seagrave	1%	2%	3%
None of these athletes	25%	26%	20%

C9: Sports associations driving positive attitudes towards brands

Which of the following sports associations would make you think more positively about a brand?

	Canada	Mexico	United States
Sample size	1001	1009	1325
Women's professional sports	35%	51%	22%
Men's professional sports	31%	42%	23%
Women's amateur sports	18%	23%	12%
Women's collegiate sports	15%	32%	18%
Men's amateur sports	13%	13%	10%
Men's esports	7%	12%	9%
Men's collegiate sports	12%	20%	16%
Women's esports	7%	16%	7%
None of these	48%	22%	56%

C10: Beliefs in ways women should support women's sports

In what ways, if at all, do you think female celebrities, female athletes, or other high-profile women, should be involved in supporting women's professional sports?

	Canada	Mexico	United States
Sample size	1001	1009	1325
Post on social media	37%	55%	35%
Attend games as fans	40%	40%	39%
Become part of league advisory boards	35%	49%	33%
Be an announcer/commentator	37%	46%	32%
Invest as owners of teams	38%	38%	40%
Not sure	30%	11%	33%
They should not be involved	5%	2%	5%

C11: Attitudes towards women's sports in past five years – improved a lot/slightly

Do you think the following aspects of women's sport (in general) have improved or declined in the past five years?

	Mexico	United States
Sample size	1021	2019
Quality of women sport/games	74%	44%
Live coverage of women's sport/games	60%	38%
Ease of following or watching women's sport/games	57%	34%
Availability of news on women's sport/games	55%	35%
Sponsorship for women's sports/games	54%	35%
Live attendance of women's sports/games (prior to covid-19)	50%	30%

C12: Drivers of interest in women's sports

Which of the following options applies to your current support of women's sporting events?

	Mexico	United States
Sample size	1021	2019
I watch or follow women's large sporting events like World cups, Olympics and Common wealth games	36%	18%
I watch or follow women sporting events whenever my country is playing	22%	11%
I watch or follow women sporting events whenever my favourite player/athlete is playing	13%	7%
I watch or follow women sporting events when my favourite team is playing	13%	7%
I follow women's sport via Digital and social media platforms	19%	4%
I watch or follow women sporting events whenever UAE is playing	0%	0%
Other	16%	32%
Don't know	25%	38%

C13: Attitudes towards women's sports – definitely/tend to agree

Please state your level of agreement with the following statements.

	Mexico	United States
Sample size	1021	2019
Women officials (referees) are just as good as men officials	74%	54%
Women sports managers are equally as skilled as male sport team managers	77%	53%
Where a sports body organises an event for men and an equivalent event for women, the prize money on offer should be the same	78%	48%
I would like to see more exposure for women's sport	64%	35%
If there was more women's sport on TV, I would watch it	52%	19%
I think more of a brand if I see that it sponsors women's sport	36%	23%



APPENDIX D:

UNITED ARAB EMIRATES

D1: Followership of men's & women's sports

Which, if any, of the following sports do you watch or follow?

	United Arab Emirates
Sample size	1147
Men's professional sports	48%
Women's professional sports	19%
Men's amateur sports	15%
Men's collegiate/university sports	16%
Women's amateur sports	12%
Women's collegiate/university sports	10%
None of these	26%

D2: Relative consumption of men's and women's sports

Do you consume more men's sports or women's sports?

	United Arab Emirates
Sample size	189
I consume more men's sports	59%
I consume both men's and women's sports equally	24%
I consume more women's sports	16%
Don't know	1%

D3: Reasons why people don't engage in women's sports?

Which, if any, of the following, do you believe are reasons why people don't engage with women's sports as much as men's sports?

	United Arab Emirates
Sample size	1147
Less media coverage (reporting, highlights, etc.)	32%
Lack of knowledge about the teams and/or athletes	32%
Limited marketing	32%
Cannot easily find games to watch on TV, online, or other channels	23%
Fewer people around me are interested in it	28%
The coverage is not high enough quality	18%
Skill level is not as high	24%
Games are slower	18%
Games are not as physical	17%
Don't know	12%
Not applicable – I believe people engage with women's sports as much as men's sports	7%

D4: Reasons why people become interested in women's sports

Which, if any, of the following reasons do you think explain why people become interested in women's sports?
Please select all that apply.

	United Arab Emirates
Sample size	1147
Watched international events (e.g., Olympics, FIFA World Cup) and continued support into local leagues	41%
Played sport(s) as a child and interest continued	32%
Have/Had children who play/played sport	27%
Friends/Family introduced them to a player/team/league	37%
Saw highlights that sparked their interest	33%
There's a team/event based in their area	24%
Don't know	15%
Other	0%

D5: Perceived sexism in women's sports – great deal or some

To what extent, if at all, do you think there is sexism in each of the following?

	United Arab Emirates
Sample size	1147
Professional sports	51%
Amateur sports	46%
Collegiate/University sports	46%

D6: Equity between men's and women's sport – not at all/not very

To what extent, if at all, do you believe each of the following aspects of the business of sports are equitable in the way they treat women, as compared to men?

	United Arab Emirates
Sample size	1147
Media coverage	38%
Athlete salaries/winnings	35%
Sponsorship	34%
Investment by governing bodies	36%

D7: League interest top 3 box – one of my top interests/somewhat interested/a little bit interested

What is your level of interest in the following sports leagues/events? Please select one option in each row.

League interest top 3 box	United Arab Emirates
Unweighted N	1147
FIFA Women's World Cup	69%
Women's Tennis Association (WTA)	69%
Women's National Basketball Association (WNBA)	62%
Women's MMA	59%
Ladies Professional Golf Association (LPGA)	55%
Women's E-sports/professional video gaming competitions	61%
W Series	59%



D8: Awareness of female athletes

Which, if any, of the following athletes are you aware of?

	United Arab Emirates
Sample size	1147
Serena Williams	35%
Maria Sharapova	32%
Naomi Osaka	19%
Lindsey Vonn	10%
Angelique Kerber	7%
Simone Biles	8%
Simona Halep	10%
Megan Rapinoe	8%
Alex Morgan	12%
Samantha Kerr	8%
Garbine Muguruza	5%
Michelle Wie	7%
Jelena Dokic	8%
Ashleigh Barty	7%
Bianca Andreescu	6%
Sofia Goggia	9%
Amanda Nunes	8%
Maria Herrera	10%
Tayla Harris	7%
Bethany Hamilton	6%
Kim Sei-young	8%
Ko-Jin Young	7%
Candace Parker	8%
Tyler Wright	8%
Laia Sanz	5%
Wendie Renard	6%
Eugenie Le Sommer	5%
Dorothea Wierer	5%
Rachel Atherton	6%
Lydia Ko	6%
Diana Taurasi	7%
Sarah Sjostrom	7%
Inbee Park	5%
Danielle van de Donk	4%
Skylar Diggins	6%
Carissa Moore	7%
Leticia Bufoni	5%
Claudia Gadelha	6%
Maia Shibutani	6%
Tahnee Seagrave	3%
None of these athletes	26%

D9: Sports associations driving positive attitudes towards brands

Which of the following sports associations would make you think more positively about a brand?

	United Arab Emirates
Sample size	1147
Women's professional sports	34%
Men's professional sports	54%
Women's amateur sports	13%
Women's collegiate sports	13%
Men's amateur sports	21%
Men's esports	23%
Men's collegiate sports	20%
Women's esports	11%
None of these	18%

D10: Beliefs in ways women should support women's sports

In what ways, if at all, do you think female celebrities, female athletes, or other high-profile women, should be involved in supporting women's professional sports?

	United Arab Emirates
Sample size	1147
Post on social media	44%
Attend games as fans	40%
Become part of league advisory boards	39%
Be an announcer/commentator	30%
Invest as owners of teams	34%
Not sure	16%
They should not be involved	4%
None of these	18%

D11: Attitudes towards women's sports in past five years – improved a lot/slightly

Do you think the following aspects of women's sport (in general) have improved or declined in the past five years

	United Arab Emirates
Sample size	1019
Quality of women sport/games	71%
Live coverage of women's sport/games	63%
Ease of following or watching women's sport/games	63%
Availability of news on women's sport/games	65%
Sponsorship for women's sports/games	62%
Live attendance of women's sports/games (prior to covid-19)	60%

D12: Drivers of interest in women's sports

Which of the following options applies to your current support of women's sporting events?

	United Arab Emirates
Sample size	1019
I watch or follow women's large sporting events like World cups, Olympics and Common wealth games	27%
I watch or follow women sporting events whenever my country is playing	23%
I watch or follow women sporting events whenever my favourite player/athlete is playing	19%
I watch or follow women sporting events when my favourite team is playing	17%
I follow women's sport via Digital and social media platforms	19%
I watch or follow women sporting events whenever UAE is playing	12%
Other	13%
Don't know	25%

D13: Attitudes towards women's sports – definitely/tend to agree

Please state your level of agreement with the following statements.

Sports attitudes definitely/tend to agree	United Arab Emirates
Sample size	1019
Sample size	56%
Women officials (referees) are just as good as men officials	56%
Women sports managers are equally as skilled as male sport team managers	60%
Where a sports body organises an event for men and an equivalent event for women, the prize money on offer should be the same	54%
I would like to see more exposure for women's sport	49%
If there was more women's sport on TV, I would watch it	48%





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